

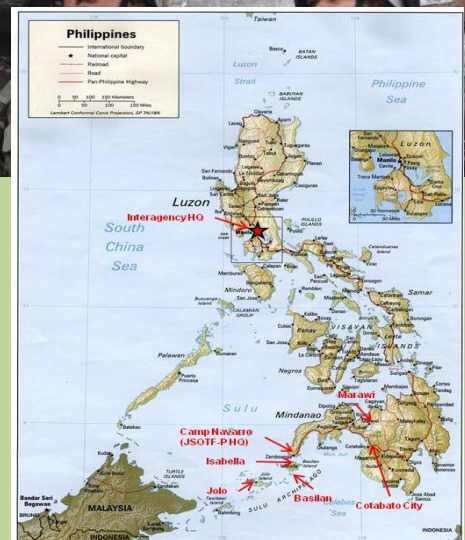
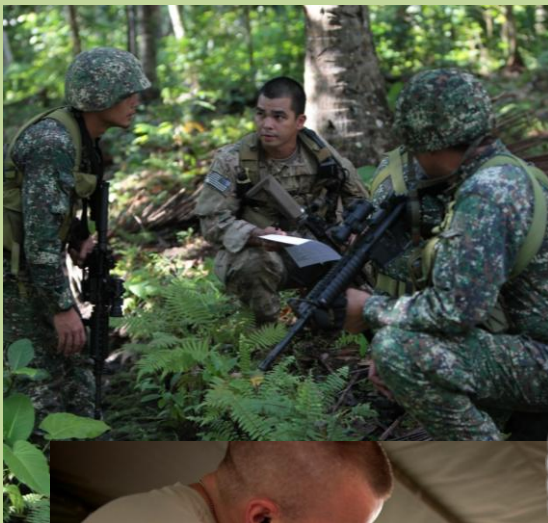
# Center for Army Analysis

## Deployed Analyst History Report Volume II

### *Analytic Support to Combat Operations in the Philippines*

(2011-2014)

DECEMBER 2015



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**DEPLOYED ANALYST HISTORY REPORT VOLUME II**  
***ANALYTIC SUPPORT TO COMBAT OPERATIONS IN THE PHILIPPINES (2011-2014)***

**SUMMARY**

**PROJECT PURPOSE:** To capture the experience of analysts deployed from the Center for Army Analysis (CAA) and United States Army Training and Doctrine Command (TRADOC) Analysis Center (TRAC) to the Philippines for Operation ENDURING FREEDOM – Philippines (OEF-P).

**PROJECT SPONSOR:** The Center for Army Analysis

**PROJECT OBJECTIVE:** To document theater experience / lessons learned in order to provide information to and prepare deploying operation research analysts for their assignments.

**PROJECT SCOPE:** To examine the roles, requirements, methods, tools, and lessons learned of deployed analysts.

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## PREFACE

The Center for Army Analysis (CAA) has supported ongoing operations in Iraq and Afghanistan from their initial planning phase. This support has enhanced planning, execution, assessment, and refinement of missions past and present.

In order to develop the military Functional Area 49 and civilian Career Field 1515, comprised of Operations Research/Systems Analysis (ORSA) analysts, and to advance and shape future support to the Operations Research Community, CAA provides this document as a historical reference.

The military developed the ORSA career field in order to provide the warfighter with direct analytic support. Peacetime analyses will continue to evolve and retain high importance; however, support to warfighting commanders and their Soldiers will always remain a main effort. This volume is the second edition of the summary work of CAA deployed ORSA analysts, and covers the support to the Joint Special Operations Task Force – Philippines from May 2011 – June 2014. The first volume covered combat operations in Iraq from November 2002 through May 2011. CAA will publish future editions as operations continue and the ORSA Community matures in structure and capacity. Classified information not included in this volume is available to properly credentialed persons by contacting the Center for Army Analysis.

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# 1 THE CENTER FOR ARMY ANALYSIS MISSION AND PRIORITIES

The Center for Army Analysis (CAA) leverages core competencies developed to support its everyday mission. The mission is to conduct analyses of Army forces and systems in the context of joint and combined warfighting. CAA is a Field Operating Agency of the Deputy Chief of Staff (DCS), G-8. The functions of CAA are to provide:

- Strategic and Operational Assessments
- Deployed Analytic Support with Reachback
- Campaign Analysis
- Operational and Institutional Capability Analyses
- Organization and Force Structure Analyses
- Modeling and Simulation Workforce Development
- Modeling and Simulation Policy and Strategy

CAA supports current operations by: a) forward-deploying CAA Operations Research/Systems Analysis (ORSA) analysts, who are military functional area (FA) 49s and civilian General Schedule (GS) 1515s; b) conducting analyses at CAA through reachback support; and c) providing ORSA Institutional Development in order to prepare and support deployed and reachback personnel.

Since 2002, CAA's military and civilian ORSA analysts have supported Operational Commanders (OCs) in Iraq, Afghanistan, the Philippines, and in other contingency operations around the globe. CAA continues to support Operation FREEDOM's SENTINEL (OFS) and Operation INHERENT RESOLVE (OIR) Commanders at the operational and strategic levels, primarily through deployed analysts, whose analyses encompass significant activity trending and forecasting, force-sizing and structuring recommendations, economic forecasting, capability-gap identification, materiel fielding and utilization assessments, and medical asset allocation recommendations. Additionally, CAA has provided several enduring instructional resources, including a Deployed Analyst Handbook; an ORSA Handbook for the Senior Commander; a Toolkit that includes hardware and specialized software for deployed analysts; and a 2-week Program of Instruction (POI) focused on preparing ORSA analysts for their deployments. These proactive efforts enable OCs and their staffs to combine institutional and operational planning into strategic recommendations for senior leaders.

In addition, through reachback support and highly skilled supplemental deployable teams, CAA performs critical primary analysis functions for the Department of the Army (DA) and supports deployed analysts in Afghanistan, Kuwait, and the Horn of Africa at the following locations:

- North Atlantic Treaty Organization's Resolute Support (NATO-RS)
- Combined Security Transition Command- Afghanistan (CSTC-A)
- NATO Special Operations Component Command – Afghanistan (NSOCC-A)
- Afghan National Army Special Operations Command – Special Operations Advisory Group (ANASOC SOAG).
- Combined Joint Task Force – Operation INHERENT RESOLVE (CJTF-OIR)
- Combined Joint Task Force – Horn of Africa (CJTF-HOA)

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## 2 PURPOSE

### 2.1 Purpose of Project

The purpose of this project is to chronicle the experiences and studies of deployed ORSA analysts in an effort to inform future analysts and the Department of Defense (DOD) of methods and means for enhancing operational and strategic plans for combat missions.

### 2.2 Purpose of Deploying Analysts

From the beginning of the Global War on Terror (later renamed “Overseas Contingency Operations”), CAA realized the importance of supporting operational commanders and voluntarily deploying analysts to Afghanistan and Iraq. The U.S. DOD Chairman of the Joint Chiefs of Staff (CJCS) soon recognized the need for direct analytic support to the warfighter, documenting such in the Organizational Command’s Joint Manning Document (JMD). By June 2009, DOD was slotting the major deployed analysts against validated positions in the JMD. All CAA deployed analysts, whether military or civilian, volunteer for their assignments. CAA continues to be an organization dedicated to providing personnel to serve the warfighter at all times and in all conditions.

“The FA 49 officer uses analytic methods and mathematically based procedures to enable leadership decisions in a constantly changing global environment. The Operations Research/Systems Analysis introduces quantitative and qualitative analysis to the military’s decision-making processes by developing and applying probability models, statistical inference, simulations, optimization and economic models. The Operations Research/Systems Analysis FA encompasses diverse disciplines that include personnel management, doctrine and force development, training management, system testing, system acquisition, decision analysis, and resource management, as well as tactical, operational and strategic planning from division through combatant command, and from ACOM through the highest levels of the DOD.” - - DA PAM 600-3

**Figure 2-1. ORSA Functions from DA PAM 600-3.**

Figure 2-1 summarizes the basic functions of FA 49/ORSA analysts. DA Pamphlet (PAM) 600-3 describes the duties of an ORSA analyst at analytic agencies such as CAA, across DOD, and in military organizations with other nations. During wartime, an ORSA analyst must provide timely analytic products. These products provide commanders with critical information used to make operational decisions.

The duties of the CAA analyst have remained virtually the same since the first deployment, regardless of the theater. The deployed analyst’s overall responsibility is to provide commanders and their staffs with operational and system-effective analyses to inform decisions, accomplished through:

- Collecting and analyzing information.
- Analyzing friendly and enemy operational patterns and trends.
- Briefing on weekly attack and casualty trends.
- Assessing campaigns and plans.
- Analyzing baselines and statistics.
- Measuring effectiveness.
- Analyzing geospatial and temporal patterns.
- Conducting predictive analysis.
- Prioritizing requirements estimates and equipment fielding.
- Modeling military systems and processes.

Deploying analysts into combat zones has proven beneficial for the entire Army, by providing commanders and their staffs with immediate analytic support. Furthermore, through reachback support, CAA provides commanders with access to the expertise and capabilities of the entire CAA organization, for both short- and long-term analysis. Several long-term efforts conducted by CAA have influenced procurement decisions and reshaped Army doctrine.

Additionally, CAA itself has benefited in numerous ways. Combat experience provides analysts with capabilities-development not possible through simulation or modeling. CAA analysts in the Continental United States (CONUS) also benefit from deployments through the Deployed Analyst Reachback Program. CAA is now better equipped to provide relevant analyses to strategic military planners (e.g., risk analysis, course of action (COA) analysis, requirements analysis, resource planning, and materiel development and acquisition analysis).

---

### 3 HISTORICAL AND OPERATIONAL OVERVIEW

The Philippines is an archipelagic nation encompassing over 7,100 islands. The nation has almost 100 million people, primarily Roman Catholic, with a minority Muslim population concentrated primarily in the Southern Philippines. The Philippines is located in a strategic portion of the world – north of Indonesia, and southeast of China and South Korea.



**Figure 3-1. Map of the Philippines and Neighboring Countries.**

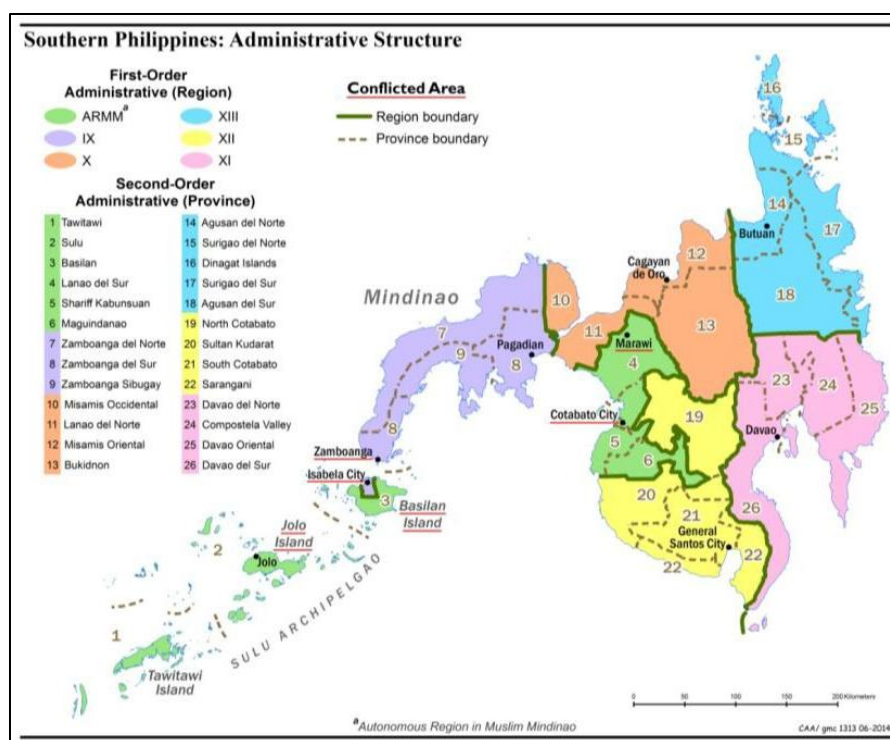




**Figure 3-2. Geographic Comparison of the Philippines and the western seaboard of the United States.**

The interagency headquarters is located in Manila on the northern island of Luzon. This geographic separation has perpetuated, if not caused, many issues between the primarily Catholic-led government in the north and the primarily Muslim population in the Southern Philippines. Struggles of self-governance, land rights, and resource allocation have provided adequate motivation for the insurgency and terrorist safe havens that exist in these conflict-affected areas.

The Autonomous Region of Muslim Mindanao (ARMM), represented in green on the map in Figure 3-3, came into being because of peace talks between the Philippine Government and the Moro National Liberation Front (MNLF) in 1989. The ARMM represents the area with the densest population of Muslims. Zamboanga City, Davao, and General Santos City, the three largest population centers in Mindanao, are predominantly Catholic, as is the predominance of the main island of Mindanao. In October 2013, the Philippine Government negotiated a new peace with the Moro Islamic Liberation Front (MILF), an offshoot of the MNLF, after the failed ARMM experiment. The ARMM will be replaced by a similar entity, the Bangsamoro Region, but as of spring 2015, the details of this transition are still undergoing negotiation.



**Figure 3-3. Administrative Structure of the Southern Philippines.**

### 3.1 Historical Perspective

In order to understand the conflict that exists in the Southern Philippines, it is useful to consider the historical context of the population. As analysts deployed in support of this task force can attest, when speaking with residents of Mindanao and the Sulu Archipelago, woes from injustices (perceived or actual) committed several generations back are as raw and real as if they were committed yesterday.

Prior to arrival of western settlers, the Philippine Lumad, or indigenous people, formed *barangays* – essentially 10-30 families bonded together to care for each other, living by agreed upon, oral laws. In the 13th century, the arrival of Muslim missionaries initiated the conversion of the native population to Islam. Trade between Malaysia and Indonesia helped further the Islamic religion and culture in the Southern Philippines. In 1457, the sultanates of Maguindanao, Buayan, and Sulu formed the first Muslim governance in the country.<sup>1</sup>

In 1565, Spanish expeditions departed to Las Islas Filipinas (named after Philip II of Spain). Over the next 300 years, Spanish colonization spread Christianity throughout the Archipelago – sparking wars with the indigenous Bangsa people in Mindanao – the most difficult portion of the Spanish conquest. The Spanish introduced elements of western civilization such as civil law, integration of church and state, and modern public education. As part of the peace settlement of

<sup>1</sup> “Moro people,” Wikipedia, [https://en.wikipedia.org/wiki/Moro\\_people](https://en.wikipedia.org/wiki/Moro_people)

the brief Spanish-American war, the Treaty of Paris remitted the Philippines to the United States for a sum of 20 million dollars.<sup>2</sup>

During the American occupation, some of the root causes of modern turmoil in the Southern Philippines began. The stated purpose of the Insular Government, installed and managed by the United States in the pre-World War II years, was to prepare the Philippines for independence. Activities included organization of an elected legislature, and creation of a judicial system, legal codes, and a western-style educational system.<sup>3</sup>

In December 1941, hours after its declaration of war on the United States, Japan invaded the Philippines and began a period of brutal occupation. General MacArthur led the heroic liberation of the Philippines, and after the war the United States ceded its sovereignty over the island nation. Early Filipino government actions focused on economic development of Mindanao for the benefit of the nation. This government, primarily comprised of Catholics, conducted this effort by means of Christian migration into traditionally Muslim regions.<sup>4</sup>

Land laws enacted during the post-colonial government defined all unregistered lands in Mindanao to be public land or military reservations. Unfamiliar with the procedures or deterred by the years of uncertainty, the steep processing fees, and the requirement to pay taxes during the interim, many Muslims neither applied for the new lands opened up by government-funded road construction nor filed for legal title to the land they currently occupied. For their part, officials and employees of the Bureau of Lands (virtually all of them Christians) were at best inattentive to Muslims.<sup>5</sup>

The Bureau of Lands recognized land rights based upon priority of claim filed, not priority of occupation. It was not unusual for individuals to obtain legal titles, either intentionally or unintentionally, to already-occupied lands. In such cases, the legal owners were mostly (but not always) Christians and the previous occupants ordinary Muslims. This perceived and actual discrimination against the Muslims in Mindanao set the stage for the Muslim separatist movement that still exists today.<sup>6</sup>

### 3.2 Joint Special Operations Task Force – Philippines History

At the advent of analytic support to the Joint Special Operations Task Force – Philippines (JSOTF-P), many within CAA, the Army, and U.S. population in general were largely unaware of the small Special Operations Task Force that had been continuously operating in the Southern Philippines since shortly after September 11, 2001. To this end, a brief synopsis of the origin of the task force follows.

<sup>2</sup> “History of the Philippines (1521–1898),” Wikipedia, [https://en.wikipedia.org/wiki/History\\_of\\_the\\_Philippines\\_\(1521-1898\)](https://en.wikipedia.org/wiki/History_of_the_Philippines_(1521-1898))

<sup>3</sup> “History of the Philippines (1898–1946),” Wikipedia, [https://en.wikipedia.org/wiki/History\\_of\\_the\\_Philippines\\_\(1898-1946\)](https://en.wikipedia.org/wiki/History_of_the_Philippines_(1898-1946))

<sup>4</sup> “Japanese occupation of the Philippines,” Wikipedia, [https://en.wikipedia.org/wiki/Japanese\\_occupation\\_period\\_of\\_the\\_Philippines](https://en.wikipedia.org/wiki/Japanese_occupation_period_of_the_Philippines)

<sup>5</sup> Thomas M. McKenna, *Muslim Rulers and Rebels: Everyday Politics and Armed Separatism in the Southern Philippines* (Berkeley: University of California, 1998), 117

<sup>6</sup> Ibid., 118



**Figure 3-4. Abbreviated Task Force History.**

On 27 May 2001 – Terrorists took 20 hostages from Dos Palmas dive resort on Palawan Island in the Southwestern Philippines. Among the hostages were three U.S. citizens: Martin Burnham, his wife Gracia Burnham, and Guillermo Sobrero. The terrorists took the hostages to Basilan Island.

The Abu Sayyaf Group (ASG), an Al-Qaeda offshoot, used Basilan, located 5 miles off the southern tip of the Zamboanga Peninsula of Mindanao, as a safe haven for their activities.

In response to the attacks on 11 September 2001, United States Pacific Command (PACOM) announced that U.S. forces would aggressively attack Al-Qaeda-linked terrorist groups operating in Southeast Asia – particularly in the Philippines. This guidance led to the terrorist coordination and assistance visit (TCAV), led by then Colonel David Fridovich, Commander of the 1st Special Forces Group (Airborne) (SFG(A)).<sup>7</sup> A team from the 1st SFG(A) deployed to the Philippines to conduct a detailed assessment of the Armed Forces of the Philippines (AFP). It visited the AFP headquarters in Zamboanga City and task force headquarters on Basilan Island, where Philippine forces were focusing their efforts against the ASG. The visit confirmed previous suspicions regarding AFP deficiencies, chief among them being a lack of communications infrastructure, ineffective command and control, lack of mobility assets, and ineffective operations/intelligence fusion.

To gain the necessary legal authorities, on 22 January 2002 the U.S. Defense Secretary advised the U.S. Commander in Chief for Pacific Forces (USCINCPAC) that per the agreement between Presidents Bush and Arroyo, no more than 600 U.S. personnel would deploy to the Philippines in support of Operation FREEDOM EAGLE. Just days later on 28 January 2002, the JSOTF-P was

<sup>7</sup> COL Fridovich's career culminated as the Deputy Commander of Special Operations Command, retiring as a Lieutenant General.

established with the arrival of the main body of Joint Task Force (JTF) 510 at Camp Navarro in Zamboanga City.<sup>8</sup>

The next 2 years JSOTF-P focused operations on the ASG stronghold of Basilan. The 376-day captivity of the Burnhams ended in June 2002 when the AFP raided the ASG camp where they were being held. Martin Burnham was killed; Gracia Burnham was wounded but survived. Sobrero's beheaded corpse was found in a shallow grave in October 2002.

Over the course of the 13-year history of the task force, the task force changed size, composition, and even name. What did not change was the substance of the mission, namely to conduct foreign internal defense (FID) activities and counterterrorism (CT) assistance. The task force mission was as follows: "JSOTF-P, in coordination with the U.S. Country Team, conducts FID with the Government of the Philippine Security Forces (PSF) to defeat Violent Extremist Organizations (VEO) and neutralize enemy safe-havens."

The key to this mission statement is that JSOTF-P operated in a FID role at the invitation of the Philippine Government. JSOTF-P operated within a tight Visiting Forces Agreement (VFA) known as Kapit Bisek. The task force conducted all operations by, with, and through Philippine counterparts with the goal of making the Southern Philippines inhospitable to transnational terrorism.<sup>9</sup>

### 3.3 Area of Operations

Mindanao is situated in the Southern Philippines and is where a majority of insurgent and transnational terrorist events have occurred in the Philippines. As a result, the JSOTF-P focused its FID efforts in Mindanao and the Sulu Archipelago. The task force also maintained a presence in the interagency headquarters in Manila. This presence, in addition to ensuring a well-integrated U.S. effort, also facilitated influence of the policy and resourcing decisions of the Metro Manila-based Headquarters of the Armed Forces of the Philippines. These key locations are outlined in Figure 3-5.

<sup>8</sup> JTF-510 is Special Operations Command Pacific (SOCPAC's) deployable headquarters.

<sup>9</sup> Current as of March 2014.



Figure 3-5. Key locations in JSOTF-P Area of Operations.

### 3.4 The Mindanao Working Group

In late 2010, the U.S. Ambassador to the Philippines, Harry K. Thomas, directed the formation of a Mindanao Working Group (MWG), designed to integrate U.S. Government efforts in this troubled region. Early efforts of this working group prioritized six conflict-affected areas:

- Zamboanga City
- Isabela City
- Southern Basilan (Island of Basilan, less Isabela City)
- Jolo Island
- Marawi City
- Cotabato City

These focus areas were chosen for two primary reasons. Primarily, the Ambassador recognized that the six areas were where Abu Sayyaf and Jemaah Islamiyah, another Islamic terrorist group, had strongholds, safe havens, or financial bases from which to conduct their operations. The second reason for the choice of the six conflict affected areas was that JSOTF-P had existing relationships with Philippine forces, established bases, and significant contacts from which to facilitate the whole-of-government approach that Ambassador Thomas was seeking. His vision was to develop a working strategy using all the tools that the U.S. Government could combine to affect positive change in conflict-affected areas.

Travel by U.S. Embassy personnel is restricted to certain areas of Mindanao, and prohibited in others. Often, policy and program decisions made by members of the MWG were conducted



without the ability to actually speak with the people or view the area where the policy or program would be implemented. Aligning the focus areas with JSOTF-P bases provided the potential for increased situational awareness by the non-JSOTF-P members of the MWG.

To execute Ambassador Thomas' vision of an integrated "3D" effort in Mindanao (Defense, Development, and Diplomacy), he brought together key players of the U.S. Government in the Philippines. The Ambassador spelled out five primary functions for this group:

- 1) Enhancing Counterterrorism Support to the Armed Forces of the Philippines
- 2) Enhancing Sustainable Economic Growth
- 3) Law Enforcement and Justice Sector Improvements
- 4) Governance and Rule of Law Improvements
- 5) Enhancing Social Justice and Conflict Mitigation Mechanisms. Members of this group

(shown in Figure 3-6) included:

**Department of State:** Political (POL), Public Affairs (PAS), Regional Security Office (RSO), Antiterrorism Assistance (ATA), and Economic (ECON) sections of the U.S. Embassy.

**Department of Defense:** JSOTF-P, Special Operations Command Pacific (SOCPAC)

**USDA:** U.S. Department of Agriculture

**DHS:** Department of Homeland Security

**JIATF-W:** Joint Interagency Task Force – West

**USAID:** U.S. Agency for International Development

**DOJ:** U.S. Department of Justice, International Criminal Investigations Training Assistance Program (ICITAP), Drug Enforcement Administration (DEA)



**Figure 3-6. Mindanao Working Group – A whole of government approach.**



In the early days of the MWG, the group met infrequently, often discussing topics of mutual interest, but the lack of a strategic plan plagued the group. To address this shortfall, the U.S. Embassy commissioned a planning conference for early May 2011, with the intent to codify the charge of the working group and develop an assessment framework from which to understand the impact of the efforts.

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## 4 ADVENT TO IN-THEATER ANALYTICAL SUPPORT TO JSOTF-P

The lead-up to CAA's support to JSOTF-P began in 2010 while CAA's Military Deputy Director, Colonel Chris Hill, was attending the pre-command course at the Army War College in Carlisle, Pennsylvania.<sup>10</sup> As a component of the brigade-level centralized selection list billet at CAA, Colonel Hill had the opportunity to interact with other brigade-level commanders in the Army, including the incoming commander of 1st SFG(A) Colonel Francis Beaudette.

Colonel Beaudette would also be responsible for the JSOTF-P operations. Over the course of several weeks during the pre-command course, Colonels Hill and Beaudette had the opportunity to discuss various topics, including concerns and areas of perceived risk in their respective upcoming assignments. One specific concern for Colonel Beaudette was that while he was confident that his special operations forces (SOF) staff could plan and execute operations in the Philippines very well, he was not as confident that the staff could assess their impact in an unbiased manner. Specific concerns surfaced about the skill set to consider applicable metrics, methodology, and products to do this. Colonel Hill's previous experiences guided the discussion towards the ORSA skill set and how the methodical approach of the ORSA analyst, combined with the operational experience of his staff, could combine to provide the JSOTF-P with an unbiased assessment.

Following the pre-command course, Colonels Hill and Beaudette maintained episodic contact to continue the discussion of the integration of ORSA and SOF skill sets to create an assessment of the JSOTF-P. Colonel Beaudette mentioned that members of his staff had interacted with ORSA personnel during previous deployments to Iraq and Afghanistan and recommended acquiring ORSA support for the task force in the Philippines.<sup>11</sup> To this end, Colonel Beaudette reached out to Colonel Hill to "officially" request support for the 1st SFG(A) command post exercise (CPX) – held in Joint Base Lewis McChord in early May 2011.

### 4.1 Forward Support to the 1st Special Forces Group (Airborne) Command Post Exercise (Joint Base Lewis McChord)

Majors Joseph Lindquist and Christian Teutsch departed for Joint Base Lewis-McChord on 1 May 2011 to initiate support to 1st SFG(A). On 2 May, the CAA team signed into the Special Forces Group and worked through the administrative system (issuance of badges, United States Special Operations Command Nonsecure Internet Protocol Router Network (NIPR) / SECRET Internet Protocol Router Network (SIPR) accounts, and security clearance verification). Analytic support began by attending the 1st SFG(A)'s command and staff meeting. Following the meeting, the CAA team met at length with the J-3 Future Plans/Operations section to understand the perceived "assessment gap" that was identified during the Group's mission analysis. The 1st SFG(A) had identified that their metrics for assessing progress in three objective areas relied solely upon qualitative, subject matter expert (SME) assessments. Ultimately, the staff indicated that they wanted to add assessment capacity by consideration of

<sup>10</sup> Colonel Hill retired from the Army in 2013 and is currently the Chief of the Army Materiel System Analysis Activity Forward Support Cell in Redstone Arsenal, Alabama.

<sup>11</sup> Colonel Beaudette specifically mentioned that his executive officer, Lieutenant Colonel Dave Matarazzo, had positive interactions with Lieutenant Colonel John Dinges (CAA Alumni) during a deployment to Iraq.

more quantitative measures and would like assistance in determining these metrics and systematic methods to collect the data.

During discussions with various staff members, it became evident that there was no centralized repository for JSOTF-P data and there were no standardized systems to collect the data. During the 1st SFG(A) pre-deployment site survey conducted in April, the 1st SFG(A) J-2 (Intelligence) returned with several terabytes of flat file and image data from several sources that spanned a great extent of the JSOTF-P mission (dating back to 2006). The J-2 indicated that the data resided in many formats (to include formatted and unformatted text documents, PowerPoint, Excel, and image files). The J-2's goal was to develop a system similar to the Afghanistan and Iraq Combined Information Data Network Exchange (CIDNE) system for future JSOTF-P data. The key here was that while the staff recognized the value of the historical/longitudinal data, they also recognized that the effort to put these data into a relational database was significant. There were no plans to format the historical data.

The CPX kicked off on 3 May with a Mission Analysis brief to Colonel Beaudette. Majors Lindquist and Teutsch integrated with the J-3 Future Operations cell (J35) to understand the planning process and identify metrics (both qualitative and quantitative) that could assist the Commander in assessing objectives. Additionally, the CAA team met with Civil Affairs (CA), Military Information Support Operations (MISO), and Public Affairs (PA) officers to determine what their objectives were and how they could tell if operations were successful (or, conversely, if they were unsuccessful). Further discussions with the J-2 focused on his effort to develop a JSOTF-P database. What became evident was that the J-2 was creating (not surprisingly) a database focused on cataloging intelligence data – not operational data. Cataloging operational data was considered a future effort; however, his section was focused on a system for intelligence alone.

1st SFG(A) identified several lines of operation (LOOs) as well as an extensive list of specified and implied tasks as part of the mission planning process. From this, Majors Lindquist and Teutsch began developing an assessment framework designed to facilitate the pointed comment from the 1st SFG(A)'s executive officer to “develop an explicit, nested data collection plan to assess progress.” Through the process of asking many (many) questions, the CAA team began to understand what the Task Force operations consisted of, and led the staff through an exercise in brainstorming potential ways to measure progress (these ideas were later translated into Measures of Effectiveness/Performance – MOEs and MOPs – and indicators) and potential data generation to include polling data. At the time, there were no JSOTF-P efforts to assess atmospherics using public perception polling as the means.

By the end of the week, Majors Lindquist and Teutsch had completed an assessment framework draft that linked LOOs to specified tasks to “measures of merit” to indicators. It should be noted that the staff had significant discussions on what should be considered an MOE and what should be considered an MOP; the discussion (in the opinion of the CAA team) was not constructive.<sup>12</sup>

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<sup>12</sup> Throughout many conversations with practitioners and modern assessment scholars, this project team believed that “splitting hairs” over the classification of MOEs vs. MOPs was not productive, and in fact, is destructive to early efforts in developing an assessment plan. Precision *is* important to ensuring that the language used to describe certain efforts is properly classified, however, the CAA team found it more beneficial to describe assessment measures in terms of “inputs” and “outputs,” and further classify ways to evaluate these in terms of Measures of Merit. An “input,” in the team’s vernacular, was described as something that was injected into the operational environment. An example might be a Medical Civil Action Program (MEDCAP) that vaccinated

To keep the discussion constructive, the CAA team asked the staff what items would have merit in determined progress towards LOOs. Simplifying the discussion in this fashion allowed a “superset” of potential metrics (later culled) to identify what was key to tracking progress.

The framework further suggested a method of collection based on the framework developed in the United States Institute for Peace document “Measuring Peace in a Conflict Environment” (content analysis, expert knowledge, quantitative data, survey / polling). The final component of the framework suggested a staff “owner” for each metric. The CAA team briefed the J-3 Future Operations officer on the draft framework and socialized it with the owners of the data (J-2, J-3, MISO, CA, and PA) on the validity of the metric suggested. Following several iterative changes, an overview of the framework the CAA team briefed the commander and his staff. The Commander welcomed the “fresh set of eyes” on the process and endorsed the framework to the staff.

Based on the lessons learned following the CPX, the CAA team’s “analytic mission analysis” identified several key items that would serve as a guide for initiating any further ORSA operations in JSOTF-P. These were:

1. JSOTF-P was recording operational actions using text-based, unstructured, situation reports (SITREPs). To answer salient questions for the assessment and the commanders, an appropriate mechanism to format the data would have to be developed.
2. There were three previous operational assessments conducted in the Philippines. Many of the data used in these assessments were qualitative in nature, informed by SME opinions. The Task Force requested a more balanced approach to the assessment – including qualitative *and* quantitative measures to inform progress metrics.
3. As identified by members of 1st SFG(A), many of the desired metrics on the FID efforts included public perceptions on the indigenous forces and local government units. There was no mechanism in JSOTF-P to collect these perceptions using an unbiased methodology.
4. The staff recognized the value of the tools of operations research. There were likely additional ways to assist the staff that had not yet been uncovered.

As a result of the initial development of the assessment framework, on 5 May, 2011, 1st SFG(A) requested that the CAA team accompany a small 1st SFG(A) team deploying to the Philippines in support of the DoD/Interagency planning conference (MWG). Following CAA telephonic approval of the mission, MAJs Lindquist and Teutsch tentatively agreed to the extended support held 12-27 May 2011. This support was codified during a site visit and office call to 1st SFG(A) between Colonels Beaudette, Hill, and Steve Stoddard on 6 May 2011.<sup>13</sup> During this office call, these leaders furthered discussions about the potential for extending full-time analytic support to JSOTF-P on a trial basis. The intent at the time was to deploy an officer to the Task Force and, after several months of integration with the staff, make a joint determination on the value of

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several hundred people. In terms of doctrinal precision, the number of vaccinated people might be considered an MOP. The output of the MEDCAP – increased community access – might be considered an MOE. The important aspect, however is that there was merit in tracking both.

<sup>13</sup> Colonel Steve Stoddard retired from the Army in 2013 and is currently the Technical Director for the Center for Army Analysis in Fort Belvoir, Virginia.

continued support. The intent was to allow CAA to demonstrate the use of ORSA skills, and allow the Task Force to determine the utility of those skills.

## **4.2 Forward Support to the Mindanao Working Group Planning Conference (Manila, Republic of the Philippines)**

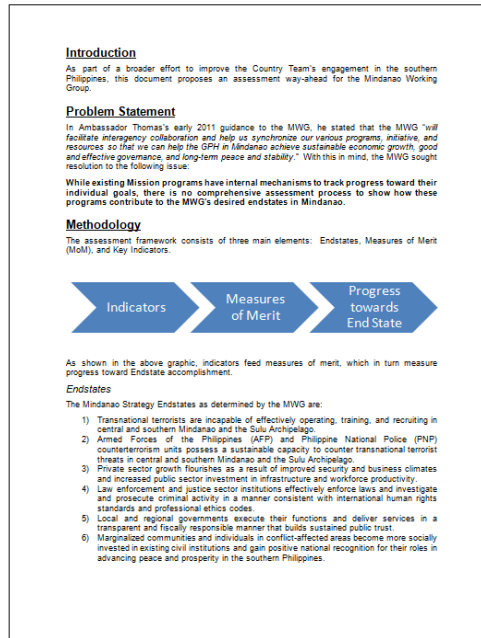
Shortly after the conclusion of CPX support at Joint Base Lewis-McChord (JBLM), Majors Lindquist and Teutsch deployed to Manila, Republic of the Philippines, to initiate support to the DoD/Interagency planning conference for the Mindanao Working Group. The CAA team's role in this planning conference was to develop an assessment framework for the MWG. Majors Lindquist and Teutsch arrived in Manila on 13 May 2011 and were met by JSOTF-P personnel at the airport and escorted to the Mandarin Oriental Hotel. The following day, the CAA team met with the rest of the Planning Conference team and was assigned to the Assessments cell.

During this planning conference, the CAA team met with representatives of the agencies outlined in Figure 3-6 to determine programs executed in the Southern Philippines and how stakeholders would know if the program was progressing, stagnant, or even regressing. Additionally, Majors Lindquist and Teutsch "invited themselves" to several meetings. These included:

- The U.S. Embassy Law Enforcement Working Group
- Social Weather Stations Polling Out-brief of Support to the U.S. Embassy
- Civil Affairs Working Group
- USAID Civil Military Operations Working Group

These events and interviews, conducted over 2 weeks, served as a base for developing three documents delivered and out-briefed to the Deputy Chief of Mission on 26 May. These documents were:

- 1) MWG Assessment Methodology – Sample shown in Figure 4-1.
- 2) MWG Assessment Framework – Sample shown in Figure 4-2.
- 3) Sample "dashboard" of how to report results – Sample shown in Figure 4-3.



**Figure 4-1. Sample of MWG Assessment Methodology.**

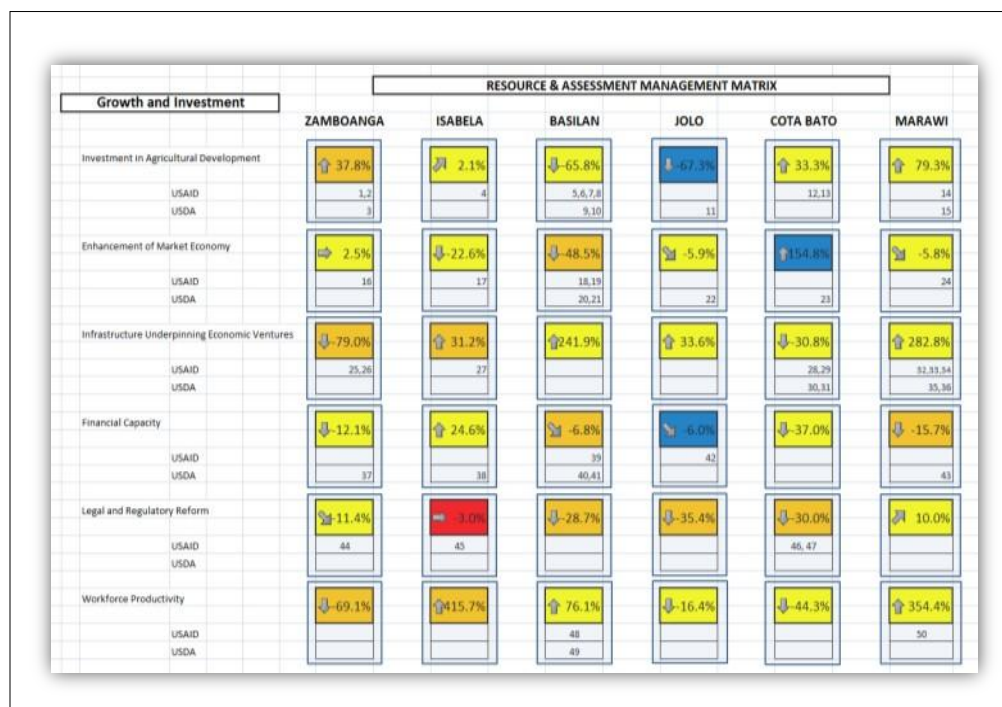
MWG Endstate:		Transnational terrorists are incapable of effectively operating, training, and recruiting in Central and Southern Mindanao and the Sulu Archipelago.			
FOCUS AREA: TRANSNATIONAL TERRORIST NETWORK					
Measure of Merit	Indicator Number	Indicator	Method	Frequency	Proposed MWG "Owner"
Decrease in TNT ability to Operate in Central and Southern Mindanao and Sulu Archipelago	1	Number of times TNTs have been successfully disrupted by PSF Direct Action Operations	Quantitative Data	Quarterly	JSOTF-P
	2	TNT number of successful violent events	Quantitative Data	Quarterly	JSOTF-P
	3	Ability of TNTs to conduct command, control, communicate, computers, intelligence, surveillance and reconnaissance (C4ISR) operations	SME	Quarterly	JSOTF-P
	4	TNT ability to conduct and exploit events with information operations	SME	Quarterly	JSOTF-P
	5	Estimated number of TNT movements (across borders / utilization of major transportation systems)	SME / Quantitative Data	Quarterly	JSOTF-P
	6	Number of HVIs neutralized by PSF	Quantitative Data	Quarterly	JSOTF-P
Decrease in TNT ability to Train in Central and Southern Mindanao	7	Estimated throughput of TNT trained (during assessment period)	SME / Quantitative Data	Quarterly	JSOTF-P
	8	Dissemination of new TNT tactics, training and procedures (TTPs)	SME	Quarterly	JSOTF-P
	9	Estimated number of TNT training facilities	SME	Quarterly	JSOTF-P
Decrease in TNT ability to Recruit in Central and Southern Mindanao and Sulu Archipelago	10	Indicators of TNT or associates conducting recruitment activities (grafitti, handbills, sermons, contacts with	SME	Quarterly	JSOTF-P
	11	Estimated strength of ASG	SME / Quantitative Data	Quarterly	JSOTF-P
	12	Public observations / sentiment of TNT recruitment (attractive / been approached)	Polling	Quarterly	JSOTF-P
	13	Estimated strength of JJ	SME / Quantitative Data	Quarterly	JSOTF-P
Decrease in Indigenous Support to TNT	14	Popular and Materiel support of local people for TNT	SME / Polling	Quarterly	JSOTF-P
	15	Estimated political support for TNT	SME	Quarterly	JSOTF-P
	16	Estimated TNT or associates ability to provide basic services to win support of populace	SME	Quarterly	JSOTF-P
	17	Number of PNP Crime "Tip Line" calls against TNT	Quantitative Data	Quarterly	JSOTF-P
	18	Public sentiment towards TNT activities	Polling	Quarterly	JSOTF-P
	19	Community leader (political, religious, or other power brokers) rhetoric in reference to TNT activities	Content Analysis	Quarterly	JSOTF-P
	20	Public rhetoric observed in reference to TNT activities	Content Analysis	Quarterly	JSOTF-P

**Figure 4-2. MWG Assessment Framework Sample – End State 1.**

The methodology given to the Deputy Chief of Mission, Ms. Leslie Bassett, provided an overview of how indicators could provide insights to measures of merit, which, in turn, inform progress towards MWG end states. Additionally, it outlined “key tasks” that were yet to be accomplished, including further socialization of the framework, establishing “ownership” for each of the indicators, as well as benchmarking each of the indicators.

The MWG Assessment Framework was a result of several weeks of interviews conducted with various stakeholders from the task force and interagency partners. This document was circulated among the stakeholders following the DoD planning team’s departure in order to identify “key indicators,” as well as to provide concurrence on owner of the particular indicator.





**Figure 4-3. Sample “dashboard” for MWG Assessment Framework**

Major Teutsch, in response to a request by various stakeholders in the MWG, produced a proof-of-concept “dashboard” that was designed to report results from the assessment framework. This “dashboard” provided a very high-level overview of where each area of the assessment framework was evaluated. The product that accompanied this slide was a real-time adjustable spreadsheet that automatically updated based upon the data input.

### 4.3 Pre-deployment preparation and continued support to the Task Force

Between 27 May and 8 July, CAA and JSOTF-P solidified the decision to provide in-theater ORSA support. To facilitate this deployment, there were a variety of tasks to be completed. It began with the official request for forces by SOCPAC. There were several additional preparations, including drawing gear appropriate for the joint operations area (JOA) from the central issue facility, obtaining country clearance from PACOM, as well as attending pre-mission training (PMT) with 1st SFG(A) from 19-24 June.

PMT was conducted with 1st SFG(A) in lieu of processing through the CONUS Replacement Center in Fort Benning, GA. This 1st SFG(A) PMT included a significant amount of medical training, medical records clearing, and weapons familiarization and qualification in addition to ensuring that appropriate deployment documents were in order. The initial concept of support was to have two analysts forward in the Philippines, one at a time, for 6 months each, with access to CAA reachback support. This decision was later extended at the request of JSOTF-P.

### 4.4 Shift of Provision of Analytic Support

By the spring of 2013, CAA had requested support from the United States Army Training and Doctrine Command (TRADOC) Analysis Center (TRAC) to filling some of the deployed analyst assignments. CAA and TRAC mutually agreed that support to the JSOTF-P deployment was

consistent with TRAC's role as the Army's lead analysis organization at the tactical level. Accordingly, TRAC provided analysts to JSOTF-P for the second half of 2013 and first half of 2014. After 03 June 2014, JSOTF-P had downsized to the point at which it could no longer maintain a fulltime analyst position. Lieutenant Colonel Teutsch, then the CAA analyst on 6-month rotation at Special Operations Command Pacific, JSOTF-P's higher headquarters, assumed duties as JSOTF-P's operations analyst from his location at Camp Smith, Hawaii. From that point forward, SOCPAC would support JSOTF-P.

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## 5 IN-THEATER ANALYTICAL SUPPORT TO JSOTF-P

While the initial impetus for providing in-theater analytical support to JSOTF-P was to methodically assess the task force operations, analysts assisted the task force with many other functions. This chapter describes four broad contributions of ORSA analysts while assigned to the task force. These included:

- Data recording and management
- Understanding public perceptions in the JOA
- Campaign and operations assessments
- Other analytical support as required

While many initial efforts focused on establishing systems to facilitate the operations research required by the commander, subsequent efforts focused on maintaining the established systems and conducting the analysis.

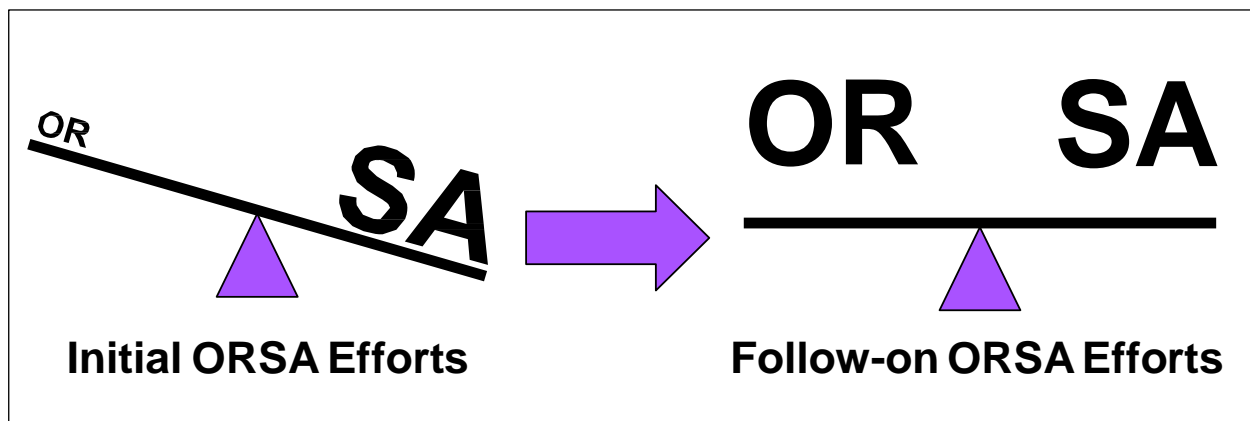


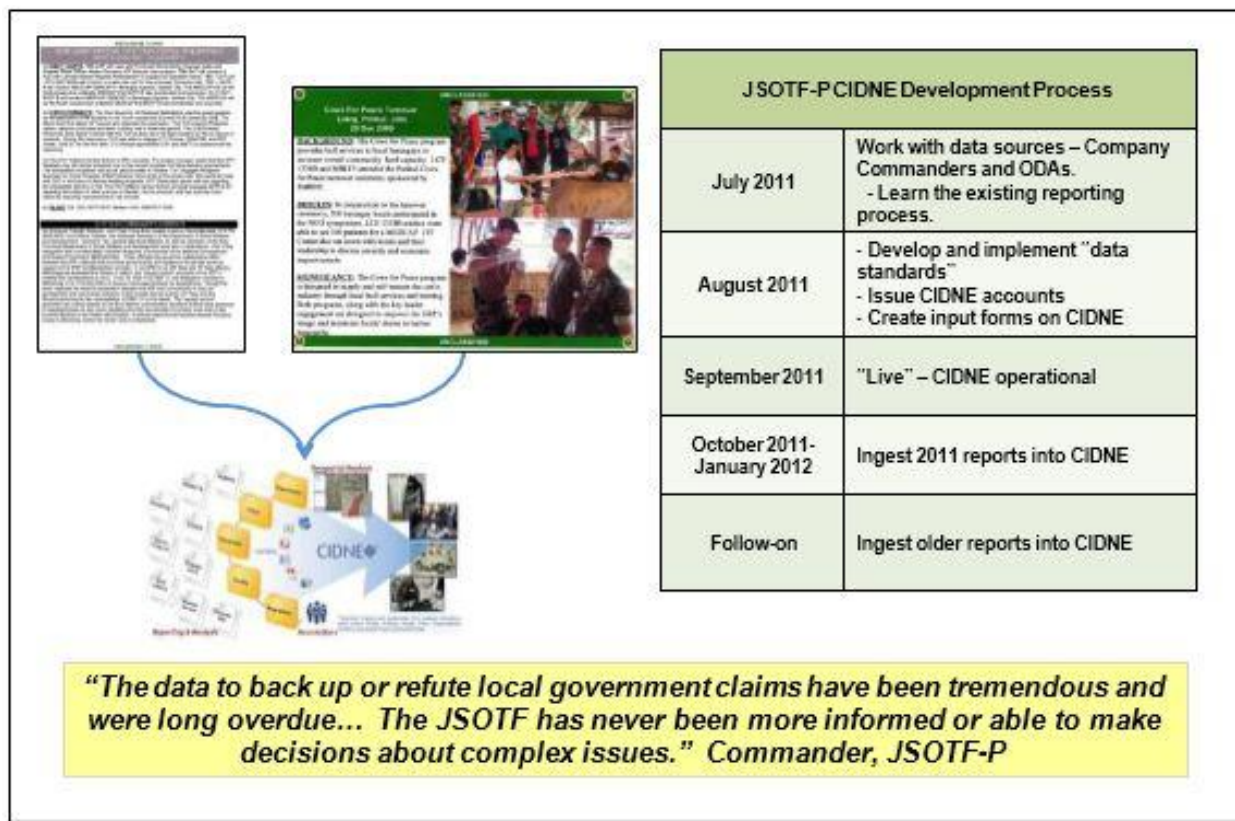
Figure 5-1. Expected evolution of ORSA efforts.

The lever/fulcrum diagram in Figure 5-1 is a visual interpretation of the type of efforts that might be required from an “expeditionary” ORSA analyst when initiating support for a task force. Early efforts may be required to establish *systems*, business rules, and structures from which traditional *analytical* tasks might be completed. Once these systems are established, these core functions of operations research analysis can be brought into balance.

### 5.1 Data Management

Prior to deploying, interactions with JSOTF-P, the U.S. Embassy, and 1st SFG(A) led Majors Lindquist and Teutsch to believe that structured data to inform analysis and assessments were going to be meager. Several members of the task force, with multiple deployments to JSOTF-P, relayed that since the inception of the task force, the prevailing thought was that the task force was “going to stand down any day” for each of their previous deployments. This paradigm did not motivate the task force to establish a methodical, robust data management system. The result was a meager amount of structured data suitable for analysis. Shortly after arrival in theater, this concern was confirmed. The lack of structured data made the commander’s *easy* questions *difficult* to answer.

One early example of this involved a request by Colonel Beaudette to inform an upcoming engagement with a Philippine Army partner. He wanted to know how many SME exchanges each component of the task force had conducted with their partners, and on which topics. His intent was to understand the level of support provided in the past to guide the engagement. Unfortunately, this simple request took over a week to complete, as the general mechanism for recording task force operations was to report the operations in a flat-file SITREP that was further filed in a SharePoint system. While this system allowed for quick access of dated data, topical searching and quantitative roll-ups were very difficult.



**Figure 5-2. Concept for collecting social data via the Southern Philippines Public Perception Survey.**

In consultation with CAA leadership, the CAA team considered several options of how to better catalogue the task force data, but ultimately selected the latent SOCPAC CIDNE system housed in Hawaii.<sup>14</sup> This system was resourced and manned, but largely unused in SOCPAC. The primary use of the system was to assist with planning of SOF Joint Combined Exchange Training (JCET) events. Knowing that this system was capable of doing much more than currently programmed for (following fielding and use in Iraq and Afghanistan), the CAA team began the process of examining how to adapt CIDNE for operational reporting use. This process is highlighted in Figure 5-2.

<sup>14</sup> Mechanisms considered to record task force operational data included “home grown” Microsoft Access databases, Tactical Ground Reporting (TIGR), Microsoft Excel based mechanisms, enhanced systems in SharePoint, and others.

Within weeks of contacting SOCPAC, JSOTF-P was using CIDNE as its database to record operational activities. There was a saying that Colonel Beaudette used quite frequently: “show me juice for the squeeze.” This was his way of saying that before he was going to subject his task forces to a new system or process he wanted to know what he would get for the effort. This constraint led to the Assessments cell’s strategy of absorbing initial work efforts of structuring the SITREPs that the task forces were currently submitting via the existing system, then demonstrate the utility of structuring the data, and follow it up with a transition of responsibilities to the units actually generating the data.

## 5.2 Public Perception Data

Much of the data that the task force and interagency had about the impact of their efforts and projects were from very anecdotal and biased sources. JSOTF-P articulated a lack of situational understanding of the public perceptions of their partners, their presence, and their activities in the JOA. The interagency articulated that their situational understanding often came in the form of statements from the individual beneficiaries of development projects, often via a phone call, occasionally through a visit to Zamboanga, but rarely to the site of the project.

To address this shortfall in situational understanding, the CAA team began the process of commissioning the Southern Philippines Public Perception Survey (SPPPS), the first of its kind (focused on the hinterlands of Mindanao). To make the most of the survey, the CAA team sought input from stakeholders shown in Figure 3-6, but ultimately ensured that all themes fit into the Ambassador’s guidance to the Mindanao Working Group.

Funding for the survey was provided by CAA. The CAA team contracted a professional polling company (Taylor Nelson Sofres (TNS) – Philippines) to conduct the surveys. TNS is part of the largest custom polling company in the world, the London-based Kantar Group.

The survey consisted of two components: qualitative focus group discussions (FGDs) and a quantitative questionnaire posed to a sample of the people of the affected areas of conflict. The qualitative FGDs provided an opportunity to “see” a snapshot of the people who would be sampled. Major Lindquist (and analysts after him) worked with the contractor to ensure that a representative of the task force could be present to observe the FGDs *without* tainting the collection. This was accomplished by setting up a closed-circuit television link between the FGD room and a secluded area where ORSA analysts, an interpreter, and as other members of JSOTF-P could observe.

- **December 2011 – Fieldwork Conducted**
- **Margin of Error**
  - **±2% Southern Philippines**
  - **± 4% Each Geographical Area**
- **Random sampling**
  - **Challenging**
  - **Municipalities → Barangays → Households → Respondents**



**Figure 5-3. SPPPS – Quantitative Survey Design.**

For the quantitative portion of the SPPPS, fieldwork was first conducted in December of 2011 with a sample size of 3,000 (resulting in the margins of error shown in Figure 5-3.) Challenges in sampling fell into a couple of general areas. First, while the contractor employed local interviewers familiar with the areas and fluent in both the language and barangay dialects, there were still other areas that were not penetrable due to security issues. The two maps shown in Figure 5-3 indicate barangays that were surveyed (shaded in green) and those that were not (shaded in red). The second main challenge dealt with the fact that obtaining a random sample in the sampled barangays was difficult. The two pictures shown in Figure 5-3 are from Zamboanga (on the top right) and the island of Basilan (on the bottom center). The sampling plan had to take into account the extremely dense communities and sizable Badjao (sea gypsy) communities that exist in the southern Philippines. Traditional sampling methods do not address this. The CAA team had to work out a reasonable method to sample these populations.

While Major Lindquist's efforts were focused on design and contracting of the survey, the later analysts had the opportunity to present the results to a variety of stakeholders – from the tactical levels of the Philippine Armed Forces to the most senior representatives (up to the President) of the Philippine government. Some of these briefings are described in Chapter 6 of this report. USAID – Philippines actually restructured its multi-million dollar Mindanao budget based upon the survey results.

In retrospect, the survey's impact was much greater than initially designed, and demonstrated its use as a mechanism to inform operations, programs, and even response to natural (internally displaced civilians following a typhoon) and manmade disasters (following combat operations

between Philippine Armed Forces and other armed groups). As of the drafting of this document, the survey is in its third year, with plans for USAID to fund the project for an additional 2 years.

### 5.3 Assessment Support

A robust literature review of the U.S. engagement in the Philippines, generally speaking, reveals that JSOTF-P operations were successful. In terms of the counterterrorism activities, as identified in the Terrorism Coordination and Assistance visit, one of the most pressing disconnects in the Armed Forces of the Philippines was a lack of operations and intelligence when conducting operations. To this end, Operations and Intelligence fusion cells were created at all Philippine Security Forces major headquarters in the southern Philippines to ensure solid operational planning. Additionally subject matter expert exchanges – nearly 2,000 conducted with partnered units on tactical tasks, civil military operations, explosive ordinance disposal, tactical combat casualty care, and sensitive site exploitation – appear to have positively affected the partnered forces.

Additionally, Civil Military Operations Projects– conducted by, with and through Philippine partners – appear to have enhanced perception of governance in the conflict affected areas of the Southern Philippines.<sup>15</sup>

This all said, perhaps the one key, easy to measure, quantifiable metric – High Value Individuals (HVIs) eliminated – as shown in the “Rewards for Justice” poster in Figure 5-4 was the one most touted. Colonel Beaudette, recognizing that there were other keys to the campaign plan, was also interested in knowing how to identify *when* the southern Philippines was inhospitable to Transnational Terrorism. His challenge to the Assessments cell was to consider how to measure this effect.

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<sup>15</sup> Civil Military Operations projects totaled more than \$25.5 million for nearly 400 projects (primarily wells, schools, area coordination centers, clinics, and bridges) at the drafting of this report.





**Figure 5-4. Rewards for Justice poster, circa December 2011, identifying many high value individuals in custody or deceased following targeted partner operations.**

The first quarterly assessment that the JSOTF-P Assessments Cell (originally consisting of Major Lindquist and the task force Information Operations Officer Major Aaron Bert) crafted was the first of its kind. However, it was not the first assessment of the task force. There were three previous assessments conducted (redundant); it appears that these assessments were viewed as an *end* – not a *means* to influence task force operations.

The previous assessments conducted “on” the task force were as follows:

- 2005 – Tied to an execute order (EXORD) extension (2-year)
- 2009 – Requested by U.S. Embassy in Philippines
- 2010 – PACOM led effort

Colonel Beaudette’s guidance shifted the purpose of the assessment to be less of a product and more of a process. He asked the CAA team to develop an assessment that would be capable of informing operations – and specifically changes to operations – with the analytics that follow. His guidance gave wide latitude on the product. Given that latitude in authorship, the Assessments cell sought to create an assessment product that took into account modern lessons learned (not yet codified in doctrine) as well as something that would actually be read and used.

The first assessment developed initially summarized Task Force operations from 2002 to the present – as documented in previous assessment documents. But it then shifted to assessing the Task Force lines of effort: Enhancing the Friendly Network, Counter Terrorism Capability Sustainment, and Maintaining Pressure on Violent Extremist Organizations operating in the Southern Philippines. While having an analytic undergirding – the assessment itself had more of a term-paper format.

The initial (and subsequent) assessment was both qualitative and quantitative in nature. The subordinate Task Force commanders contributed with their commander's assessment of the operational environment, informed by quantitative operational data and social data. The final format was a short, primarily nuanced narrative, informed by task force operations, significant activities by counterparts, and the interagency actions in the JOA.

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## 6 DEPLOYED ANALYST REPORTS

Deployed analysts submit unclassified executive summaries of their deployments for entry into the Center's Deployed Analyst History Program. Deployed analysts from the Center for Army Analysis submit three documents following any deployment. The unclassified executive summary is the first document and the second (normally classified) is a more detailed final briefing to the Center's leadership to engender discussion and refinement of the Center's deployed analyst support to Overseas Contingency Operation commands. The third is a final report (normally classified) generated from the final briefing.

What follows in this chapter is an unclassified summary of the six deployments shown in Table 6-1 below.

DEPLOYED ANALYST	SECTION	COMMAND	DEPLOYED	RETURNED
Major Joseph Lindquist	6.1	JSOTF-P	Jul-11	Jan-12
Major Christian Teutsch	6.2	JSOTF-P	Jan-12	Jul-12
Major Morris Estep	6.3	JSOTF-P	Jul-12	Dec-12
Major Tim Valadez	6.4	JSOTF-P	Dec-12	Jun-13
Major Al Behnke	6.5	JSOTF-P	May-13	Dec-13
Major Chris Marks	6.6	JSOTF-P	Dec-13	Jun-14

**Table 6-1. List of JSOTF-P ORSA Analysts**

### 6.1 CAA Deployed Analyst – Major Joseph Lindquist

Major Joseph (Joe) Lindquist, of the Operations Analysis (OA) division of the Center for Army Analysis (CAA), deployed to the Republic of the Philippines in support of the JSOTF-P on 8 July 2011. This deployment supported the 1st SFG request for forces (RFF) in early Spring 2011, and was the first in-theater ORSA support extended to this task force.

ORSA support to JSOTF-P began several months prior to the actual deployment. In April 2011, Colonel Francis Beaudette, the incoming task force commander (and serving 1st SFG Commander) requested assessment support for the 1st SFG(A) CPX held 2-7 May 2011. The intent of the ORSA support was to integrate with the 1st SFG staff preparing to deploy in support of JSOTF-P and to develop an assessment framework for JSOTF-P operations. Majors Joe Lindquist and Christian Teutsch (also from CAA) integrated with the 1st SFG(A) staff at Joint Base Lewis McChord for the exercise and developed an initial assessment framework that was socialized with key staff elements (S2, S3, S9, Deputy Commander, Chief of Staff) and briefed to the Commander.



**Figure 6-1. Major Lindquist on a Task Force helicopter moving between Zamboanga and Sulu.**

During this exercise, Majors Lindquist and Teutsch conducted an “analytic mission analysis” and identified several key items that would serve as a guide for initiating ORSA operations in JSOTF-P. These were:

- 1) JSOTF-P was recording operational actions using text-based, unstructured, SITREPs. The 1st SFG(A) S2 indicated that he was in the process of creating a structured database focused on intelligence reporting, however, there was no design for recording task force operations.
- 2) There were three previous operational assessments conducted in the Philippines. Much of the data used in these assessments were qualitative in nature, informed by subject matter expert opinions.
- 3) As identified by members of 1st SFG(A), many of the desired metrics on the FID efforts included public perceptions on the indigenous forces and local government units. There was no mechanism for JSOTF-P to collect these perceptions using an unbiased methodology.
- 4) The task force was very open to using the tools of operations research. The ORSA team spent a fair amount of time introducing key staff sections to the products of operations research. By week’s end, the ORSA team had assisted several individuals with “simple” analytic tasks using nothing more than Microsoft Excel.

### **6.1.1 Mindanao Working Group Planning Conference**

On 5 May 2011, midway through the CPX, 1st SFG(A) requested for the ORSA team to accompany a small team from 1st SFG to the Philippines for a DoD / Interagency planning conference planned for 12-27 May 2011. CAA agreed to support this request, and Majors Lindquist and Teutsch deployed to Manila, Republic of the Philippines, to initiate support to the MWG.

The MWG was an interagency working group established by Ambassador Harry K. Thomas, designed to integrate U.S. Government (USG) efforts in the JOA in Mindanao. This planning conference had three main goals:

- 1) Identify all USG efforts in Mindanao, specifically looking for gaps and overlaps in programs executed by individual agencies.
- 2) Codify the purpose and processes of the MWG in a charter document.
- 3) Develop a mechanism to assess progress towards USG goals in the Southern Philippines.

During this planning conference, Majors Lindquist and Teutsch conducted interviews with representatives from various USG entities to identify all USG-initiated programs in the Southern Philippines and to identify how stakeholders would know if a program was progressing, stagnating, or regressing. These entities included:

- Department of State: Political, Economic, Regional Security Office, Cultural Affairs, Public Affairs, and Anti Terrorism Assistance
- U.S. Agency for International Development
- Department of Justice (International Criminal Investigations Training Assistance Program, and Office of Prosecutorial Development, Assistance and Training)
- JSOTF-P

- U.S. Drug Enforcement Agency
- U.S. Department of Agriculture

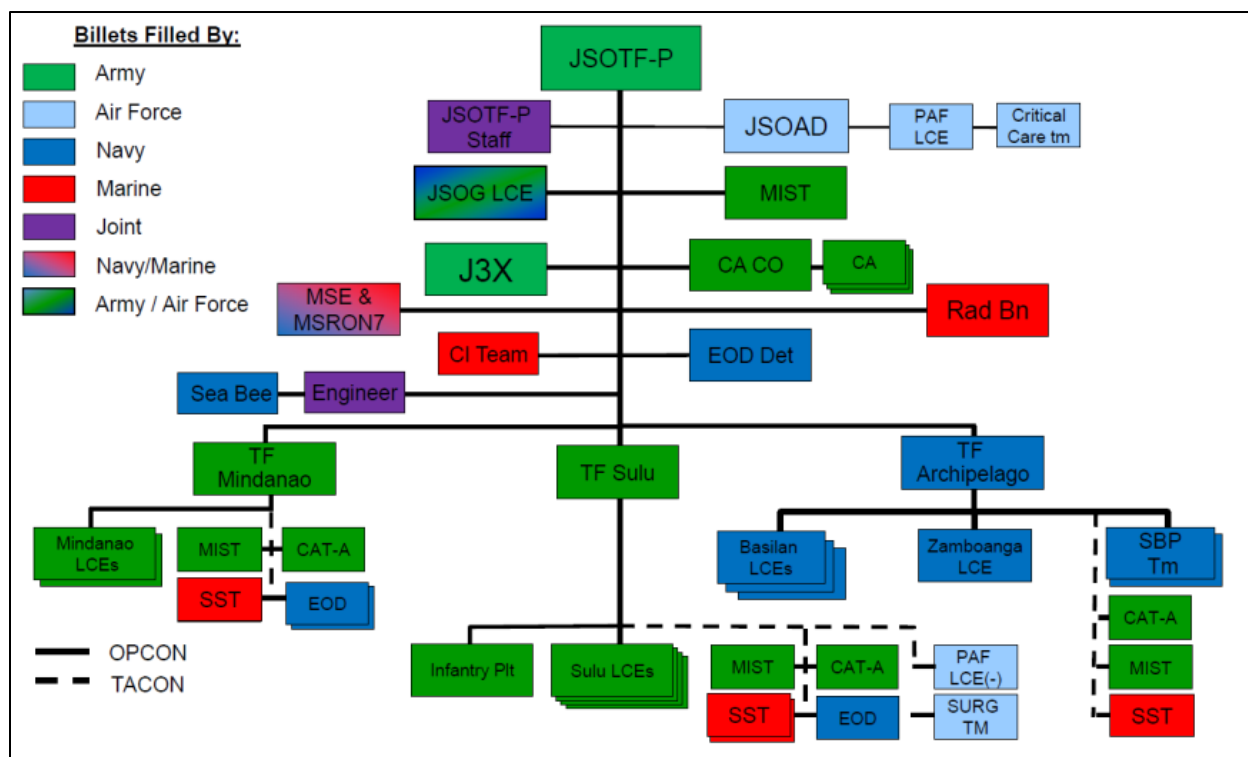
These interviews served as a base for developing two documents, the MWG Assessment Methodology (and framework) and the Public Perception Polling Plan for the Southern Philippines, delivered and outbriefed to the Deputy Chief of Mission Ms. Leslie A. Bassett on 26 May 2011.

### **6.1.2 Pre-Deployment Preparation**

Between 27 May and 8 July 2011, the official SOCPAC RFF was approved and final preparations were made for full-time ORSA support to JSOTF-P. These final preparations included drawing gear appropriate for the JOA from the central issue facility, obtaining country clearance from PACOM as well as attending PMT with 1st SFG(A) from 19-24 June 2011, in lieu of processing through the CONUS Replacement Center at Fort Benning, GA. PMT included a significant amount of medical training, medical records clearing, and weapons familiarization and qualification. Additionally, deployment documents were prepared and validated. The initial concept of support had one analyst forward in the Philippines with access to CAA reachback support for a period of 12 months.

### **6.1.3 Deployment Activities**

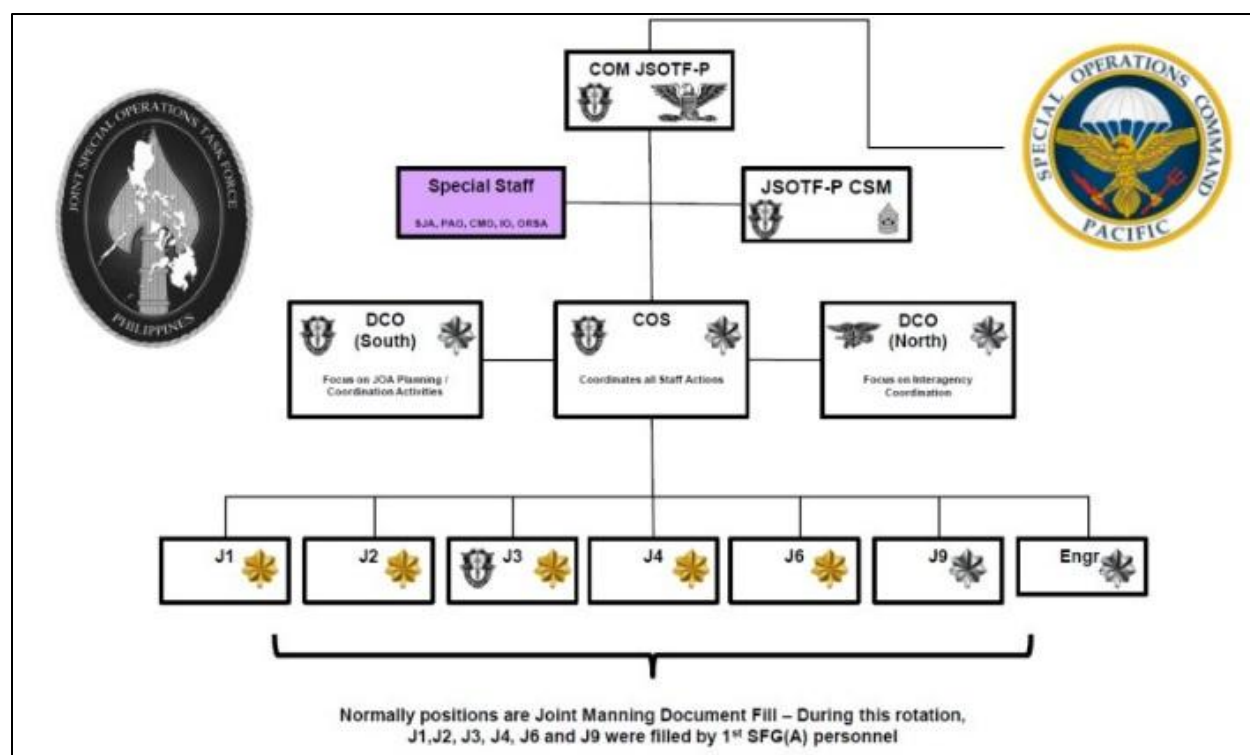
Major Lindquist was assigned to the JSOTF-P Commander's Special Staff, with administrative control to the J3. Figure 6-2 is a simplified organizational chart of the task force. Major Lindquist was senior-rated by Colonel Beaudette, the Task Force Commander, and rated by the Deputy Commanding Officer (South), Lieutenant Colonel Dave Matarazzo, a Special Forces officer primarily responsible for JOA coordination and planning actions.



**Figure 6-2. JSOTF-P Command Structure.**

Figure 6-3 is a simplified organizational chart of the task force staff. Many of the primary staff positions were filled by members of JSOTF-P commander's staff at 1st SFG(A) who had routinely worked together in garrison prior to their deployment. In many respects, this expedited actions and planning in the task force. Organizing in this way was atypical, as these positions were normally filled by a Joint Manning Document task list. Moreover, this structure benefited Major Lindquist who had met and worked with the J1, J2, J3, J4, J6, J9, and Deputy Commander (DCO) during the CPX in early May, 2011.

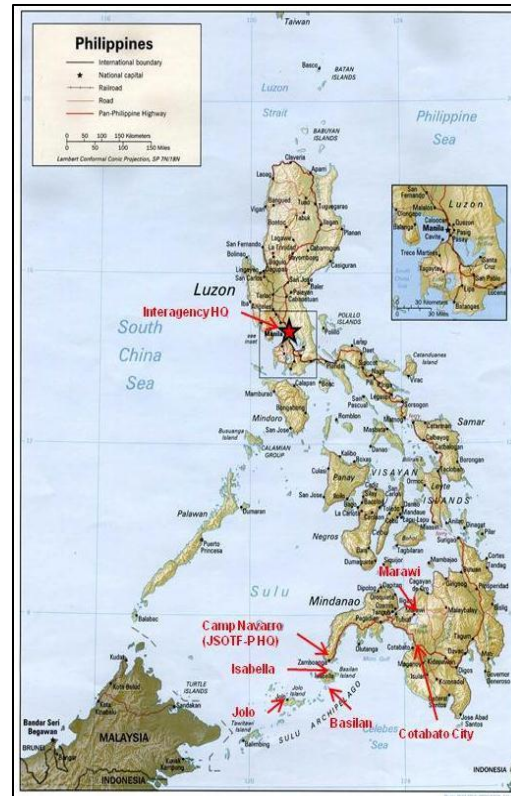




**Figure 6-3. JSOTF-P Staff Structure.**

During his deployment, Major Lindquist worked in two primary locations – at the interagency headquarters in Manila, and at the Task Force Headquarters in Zamboanga. He spent several days each week interacting with members of the U.S. Embassy and USAID, assisting them with evaluating and assessing their own operations. Additionally, there were several data exchanges that Major Lindquist was able to facilitate between the task force and experts from U.S. Embassy and USAID sections. The balance his of time not spent at the U.S. Embassy was spent in the JOA. Major Lindquist routinely interacted with Liaison Coordination Elements (LCEs) in Marawi, Cotabato, Sulu, Zamboanga, and Basilan. This involved frequent intratheater travel utilizing the Joint Special Operations Air Detachment (JSOAD) or, occasionally, commercial air.





**Figure 6-4. Map of the operational area.**

Major Lindquist had three main efforts while deployed: establishing operational data standards, drafting the JSOTF-P quarterly assessment (supporting his battle buddy and task force Information Operations Officer MAJ Aaron Bert), and commissioning and supervising the Southern Philippines Public Perception Survey. Major Lindquist also served on several joint planning groups, worked as a member of the Commanders Initiative Group, and assisted primary staff sections with basic technical assistance.

### 6.1.4 Data Management

With an abundance of data, but a dearth of structured (useful) data to inform analytics, Major Lindquist's first main effort was to develop data standards and a mechanism for rapid analysis of the data for the task force. Lack of readily usable data made the commander's "easy" questions difficult to answer. Typically, each of the geographic task forces would submit a daily SITREP and occasional "storyboards" (neither of which had specific requirements) to the task force headquarters. This said, the Assessments cell, consisting of Majors Lindquist and Aaron Bert (the JSOTF-P Information Operations Officer), developed a data standards standard operating procedure and supporting fragmentary order to ensure that submitted task force data completely reflected the information required to support the task force assessment.

To address the data cataloguing aspect of operations, several options were considered. Ultimately, retooling the latent SOCPAC CIDNE system housed in Hawaii was chosen as the course of action. This system was resourced, manned, but largely unused in SOCPAC. The primary use of the system was to assist with planning of SOF JCETs (Special Operations Forces Joint Combined Exchange Training). Knowing what this system was capable of in Iraq and

Afghanistan, the Assessments cell knew that it could be used for much more. Within weeks of contacting SOCPAC, JSOTF-P was using CIDNE as its database of record for operational activities.

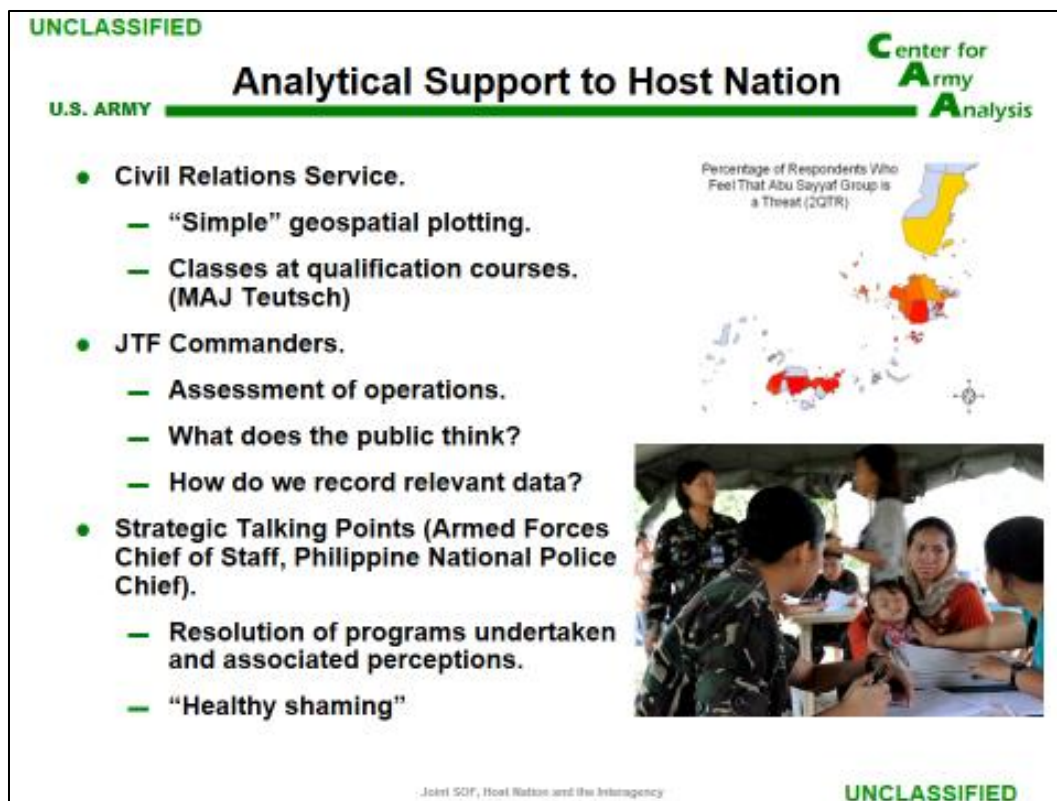
### **6.1.5 JSOTF-P Quarterly Assessment**

The JSOTF-P assessment was the first of its kind; however, it was not the first assessment of the Task Force. Three previous assessments were conducted “on” the task force – essentially in response to an outside request or requirement. First, the 2005 JSOTF-P assessment was tied to an EXORD extension (2-year); second, the 2009 assessment was requested by the United States Embassy in the Philippines; and third, a 2010 effort in response to a PACOM tasking. Colonel Beaudette’s guidance to Majors Lindquist and Bert shifted the purpose of the assessment to be less of a product and more of a process. He asked the Assessments cell to develop an assessment that was capable of informing our operations—specifically, changes to operations – with the analytics that follow. The first JSOTF-P quarterly assessment was briefed to JSOTF-P commander and SOCPAC commander (Major General Norman J. Brozenick Jr.) on 24 January 2012, and was generally well received.

### **6.1.6 Southern Philippines Public Perception Survey**

The final analytic effort—the commissioning of the Southern Philippines Public Perception Survey—had significant strategic benefits for the task force. This was the first survey to focus on the hinterlands of Mindanao and the Sulu Archipelago, and sought to address a shortfall in situational understanding from multiple stakeholders, including the U.S. Department of State, the U.S. Department of Justice, USAID, Philippine National Police (PNP), AFP, and of course, JSOTF-P and SOCPAC. All themes fit into the Ambassador’s guidance to the Mindanao Working Group. CAA funded the effort for a period of 1 year. A professional polling company – Taylor Nelson Sofres – Philippines was contracted to conduct the surveys. The contract was written to ensure that the contractor considered lessons learned about surveying in a conflict-affected environment (e.g., Iraq and Afghanistan). The survey results were briefed to strategic leadership at the AFP and PNP and soon were used in resourcing discussions with President Aquino. Additionally, some of the results were used in bilateral strategic dialogue between the United States and the Philippines. The reach of the survey went far beyond its initial intent of providing situational understanding.

## 6.1.7 Other Analytic Efforts



**Figure 6-5. Experiences with Joint SOF.**

While Major Lindquist’s primary responsibilities were to the JSOTF-P commander, many of the questions posed to him involved data and expertise that he did not currently have. This said, the data existed – albeit outside of the JSOTF-P compound. One of the two major elements of the engagement to get these data was to the host nation security forces.

Filipinos did not initially know what an ORSA analyst was, does, or can bring to their organization. This said, much of Major Lindquist’s deployment set the stage for some of the engagement successes that his successor, Major Christian Teutsch, was able to affect. While deployed, Major Teutsch briefed no fewer than 25 General Officers and nearly as many senior executives in the U.S. Country Team as well as the Philippine Security Force establishment.

Some of the support provided to the Armed Forces of the Philippines included some basic geospatial plotting of their barangay (village) assessments. During his deployment, Major Teutsch taught as an “adjunct” at the Civil Relations Service qualification courses.

## 6.1.8 Conclusion

On 27 January 2012, after transitioning with Major Christian Teutsch, Major Lindquist departed the Philippines for Washington D.C. He returned to CAA on 31 January 2012.

Major Lindquist found his tour to be very rewarding and made the following observations upon returning to CAA:

- When you are deployed as a single ORSA analyst, the ability to function and contribute as

a member of the staff at large is important to establishing credibility and confidence within the staff.

- Attending key meetings allows the ORSA analyst to understand what the commander “really” wants. Very few people take joy in attending meetings, however it is candid discussions with the commander and staff that allows the ORSA analyst the opportunity to understand what is important to the commander.
- Documenting is important. In JSOTF-P, Major Lindquist produced several dozen white papers, executive summaries, and reports to assist the commander, staff, and partners with understanding the data presented. This documentation often found its way into talking points that were used in strategic-level meetings.
- Reachback to CAA is a superb extension of an ORSA analyst’s capability. This reachback, however, is not simply “free” labor. Any reachback effort, to be useful in theater, must be appropriately scoped, supervised, and fed back to the analytic team working the project.
- When communicating with the commander, analysts must resist the temptation to show him how hard they worked to get the answer. Perhaps a significant amount of work went into a piece of analytic work, but the commander expects the analytics to be correct – and deserves a concise explanation of what the analyses mean.
- Subsequent ORSA analysts should be able to replicate and sustain any analytic tasks you undertake.
- CAA should continue its support for “expeditionary ORSA analysts.” In order to achieve the greatest benefit, ORSA analysts’ efforts should be flexed early in the employment of a task force. ORSA analysts should be prepared to establish data collection systems, assessment frameworks, and analytical rigor to processes as necessary. Once these tasks are established, it may be possible for the ORSA analyst’s role to change from full time support to establish systems to “episodic” engagement to keep systems online.
- Interagency partners must be engaged in order to determine ways to reinforce efforts in Phases IV/V / 0 environments. The interagency potentially has data, expertise, and experience that task forces can use. Additionally, the interagency has gaps that can be filled by task force information. While the interagency may have different perspectives on the operational environment, those perspectives can only make task force products better.



**Figure 6-6. Major Lindquist in front of the OEF-P dining facility holding Christmas letters from children in the Washington, DC area.**

## **6.2 CAA Deployed Analyst – Major Christian Teutsch**

Major Christian Teutsch, of the Operations Analysis (OA) division of the Center for Army Analysis (CAA), deployed to the Republic of the Philippines in support of the Joint Special Operations Task Force – Philippines (JSOTF-P) on 9 January 2012. This deployment supported the 1st SFG(A) RFF made in early spring 2011, and was the second in-theater ORSA support extended to this task force (TF).



**Figure 6-7. Major Teutsch (left) with Lieutenant Colonel Bo Gardner, JSOTF-P Chief of Staff.**

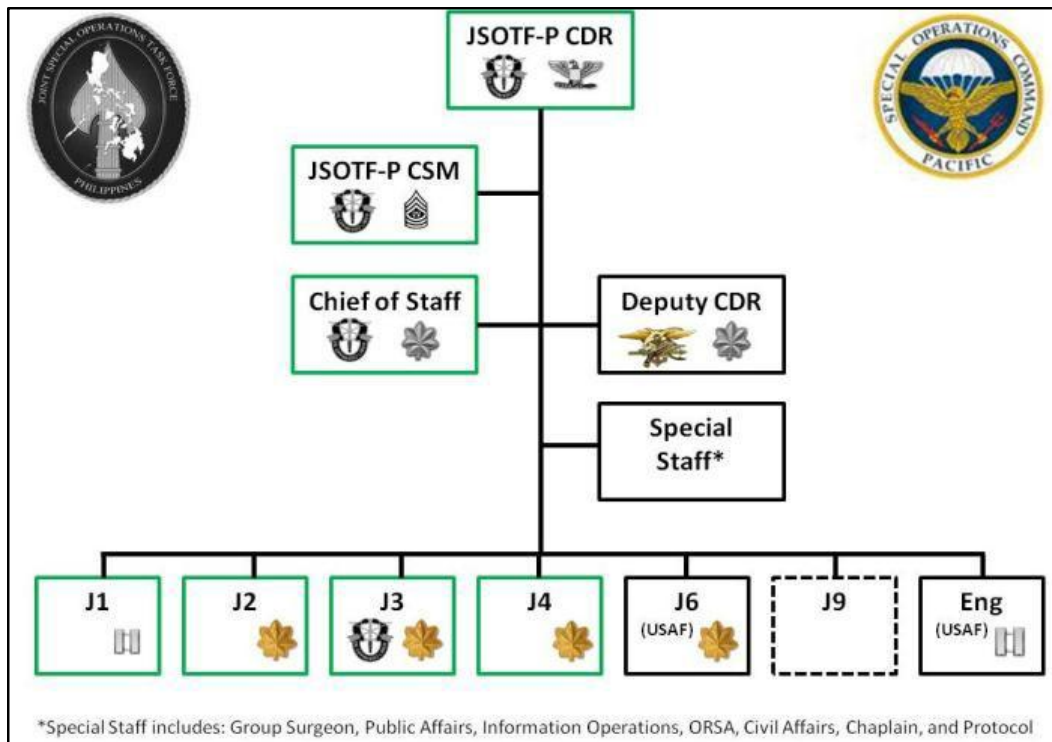
### **6.2.1 Pre-Deployment Activities**

Major Teutsch conducted his pre-deployment activities in tandem with Major Lindquist, so their description was covered in Chapter 4 of this history. While Major Lindquist was deployed, Major Teutsch served as the CAA lead for reachback support to Major Lindquist, so that Christian could prepare for his own deployment.

### **6.2.2 Deployment Activities**

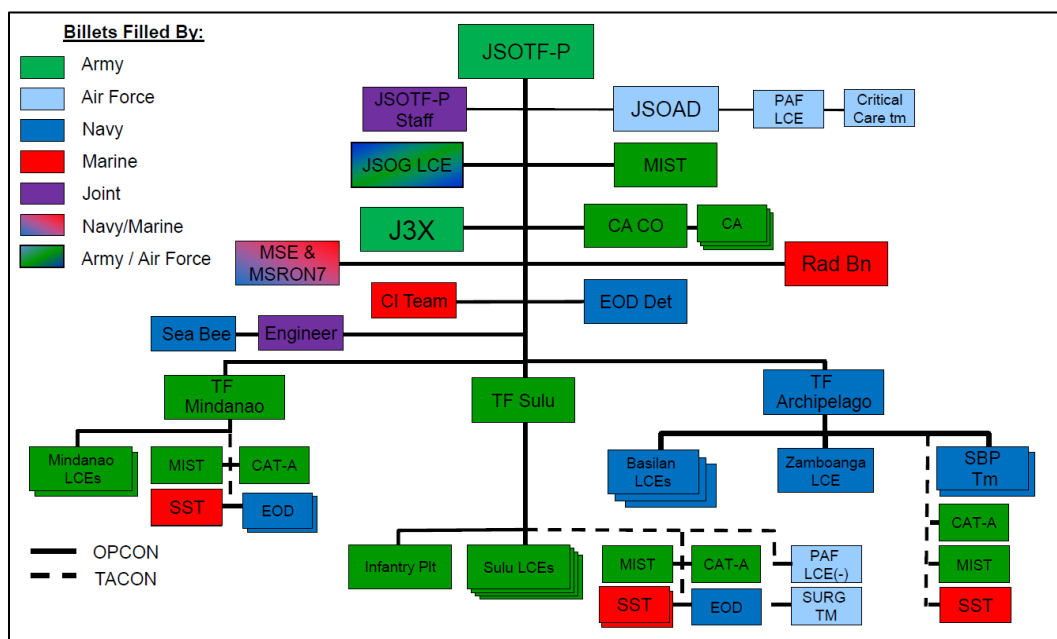
In January 2012, while en route to the Philippines, Major Teutsch stopped for 3 days at Camp Smith, Hawaii, to meet with his SOCPAC staff officer counterparts (SOCPAC is JSOTF-P's higher HQ). The relationships Major Teutsch established during this brief visit proved invaluable during his deployment.





**Figure 6-8. JSOTF-P Command Structure.**

Major Teutsch worked directly with the JSOTF-P Commander's Special Staff. Figure 6-8 is a simplified organizational chart of the JSOTF-P. Major Teutsch was rated by Chief of Staff, Lieutenant Colonel Bo Garner (a Special Forces officer from SOCPAC who had primary responsibility for JOA coordination and planning actions), and senior-rated by JSOTF-P Commander, Colonel Beaudette.



**Figure 6-9. JSOTF-P Staff Structure.**

Figure 6-9 is a simplified organizational chart of the TF staff. Members of the JSOTF-P commander's staff at 1st SFG(A)—who had routinely worked together in garrison prior to their deployment—filled many of the primary staff positions. In many respects, this expedited actions and planning in the TF.<sup>16</sup> This structure benefited Major Teutsch who had met and worked with the J1, J2, J3, J4, J6, DCO during the CPX in early May 2011. Concurrently with Colonel Beaudette's relinquishment of command at the end of May 2012, nearly the entire primary staff transitioned. Rather than arriving in theater as homogenous staff transplanted from JBLM, the staff that would serve the incoming JSOTF-P Commander, Colonel Mark Miller, was assembled from various Active Duty and Reserve Army, Marine, Navy, and Air Force units.

In Figure 6-9, green blocks denote positions initially filled by 1SFG(A) personnel. Early in Major Teutsch's tour, the J9 redeployed and was not replaced. The only 1st SFG(A) member to fill a Joint Staff position after Colonel Beaudette and his staff redeployed was the J3. The new J1 was an Army Reserve Captain, the new J2 was a Navy Lieutenant Commander, the new J4 was an Army Reserve Major, and the new J6 was an Air Force Reserve Lieutenant Colonel. During his deployment, Major Teutsch worked in two primary locations: (1) the interagency headquarters in Manila and (2) the Task Force HQ in Zamboanga. On a weekly basis, Major Teutsch interacted with members of the U.S. Embassy (USEMB) and USAID, assisting them with evaluating and assessing their internal operations. Additionally, Major Teutsch assisted USEMB and USAID with several data exchanges between themselves and JSOTF-P. Major Teutsch spent the majority of his time, however, in the JOA, routinely interacting with LCEs in Marawi, Cotabato, Sulu, Zamboanga, and Basilan. He also interacted regularly with the AFP and the PNP staffs, at both camps Navarro in Zamboanga City and Aguinaldo in Manila (see Figure 6-10). Major Teutsch's coordination efforts required him to travel throughout the theater, utilizing the JSOAD.

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<sup>16</sup> Organizing in this way was atypical, as Department of the Army Headquarters normally used the Joint Manning Document task list to fill these positions.





**Figure 6-10. Map of the Operational Area**

Drafting the JSOTF-P Quarterly Assessment and supervising and analyzing the SPPPS were Major Teutsch's two main efforts during his deployment. He also served on several joint planning groups, worked as a member of the Commander's Initiatives Group (CIG), assisted primary staff sections with basic technical assistance, and produced various additional products as required. For example, Major Teutsch drafted a paper from Colonel Beaudette to Major General Norman J. Brozenick (SOCPAC Commander) assessing lessons learned from the counterinsurgency in Indonesia that could potentially be applied to the Philippines, edited and wrote the conclusion for Colonel Beaudette's End-of-Tour report, and authored the strategic portion of Colonel Miller's 30-day Command Assessment report.

### 6.2.3 JSOTF-P Quarterly Assessment

Major Teutsch arrived in theater during the final preparation of JSOTF-P's 1st quarter assessment (the establishment and conduct of which was the primary purpose for ORSA support to OEF-P).

Major Teutsch provided the analytical portions of the 2nd quarter assessment and then undertook a revision of the structure of the assessment for the 3rd quarter. Major Teutsch had been assisting SOCPAC SOJ54 (Environmental Analysis and Assessments) with its efforts to devise assessment frameworks for each country in SOCPAC's area of responsibility (AOR). In early June 2012, the SOCPAC Assessments Team Chief traveled to Manila and other locations within the JOA to work in concert with Major Teutsch on aligning the JSOTF-P and SOCPAC assessment frameworks. Major Teutsch and the Assessments Team Chief revised the MOEs and

Measures of Effectiveness Indicators (MOEIs) and ensured their nesting under the new SOCPAC Country Objectives for the Philippines. Major Teutsch wrote the 3rd quarter assessment report and briefed it to Colonel Miller and his subordinate commanders and staffs on 16 July 2012, and to Major General Brozenick and his staff via video- teleconference (VTC) on 19 July 2012.

#### **6.2.4 Southern Philippines Public Perception Survey**

When Major Teutsch arrived in theater, newly promoted Lieutenant Colonel Lindquist had just received the data tables for the first wave of the SPPPS. Major Teutsch assisted Lieutenant Colonel Lindquist in preparing location-specific executive summaries (EXSUMs) for the TF commanders, responded to inquiries from the JSOTF-P Commander and his staff as well as SOCPAC, USAID, and PSF leadership, addressing their concerns that were answerable with survey data. Major Teutsch also prepared reports for Colonel Beaudette - one comparing polling data from Muslim respondents in Manila with Muslim and non-Muslim respondents in the JOA, and another describing public perception of the 2008 Balikatan U.S./Philippine exercises.

Major Teutsch supervised the preparation of the second and third waves of the SPPPS—including revisions, scheduling, and data delivery—and personally attended all eight focus group discussions that preceded quantitative polling. These discussions took place in Cotabato, Marawi, and Zamboanga Cities. While local interviewers conducted the discussions, Major Teutsch and his team sat in a separate room and watched the discussions via closed-circuit television.

The SPPPS had additional applications beyond addressing the command's queries and providing information for the quarterly assessment, the most prominent of which are detailed in the sections that follow.

#### **6.2.5 Support to PSF**

Major Teutsch's support to the PSF took three forms:

The first and most basic was providing analysis of the SPPPS data to AFP and PNP leadership. Major Teutsch briefed these leaders at every level, from brigade to national. As each wave of the SPPPS data became available, Major Teutsch briefed his analysis to the U.S. TF commanders and their Philippine counterparts.

When Major Teutsch briefed the second wave's analysis to the AFP J3, the AFP J3 asked him to present his findings at the first convening of the Internal Peace and Security Plan (IPSP) Working Group, which became the second form of support for the SPPPS data (see Figure 6-11). The survey findings are one of many inputs into the timing decision for transitioning the various municipalities.<sup>17</sup>

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<sup>17</sup> Similar to NATO's Tranche plan in Afghanistan.



**Figure 6-11. Major Teutsch briefing 2nd Quarter SPPPS results to AFP / PNP Leadership**

The third form of support Major Teutsch provided to the PSF was FID, providing training for analysts at the AFP Civil-Military Operations School at Camp Aguinaldo, Manila (see Figure 6-12). The course of instruction included training on devising assessments and analyzing polling data. Before Major Teutsch redeployed, he coordinated a weeklong session for Philippine nation counter-terrorism TF analysts at the request of the TF head.



**Figure 6-12. Major Teutsch (front center) after leading a course of instruction at the AFP Civil-Military Operations School at Camp Aguinaldo, Manila, Philippines, with Major Aaron Bert (rear center).**

### 6.2.6 USAID

Major Teutsch briefed the USAID headquarters in Manila approximately once per month, providing his findings and analysis of the SPPPS. In conjunction with USAID personnel, Major Teutsch constructed the Mindanao Working Group assessment framework. At the request of Ms. Gloria Steele, executive director of USAID Philippines, Major Teutsch met with USAID leadership to apply analytical rigor to the USAID project selection process.

### 6.2.7 Conclusion

On 24 July 2012, after transitioning with CAA's Major Morris Estep, Major Teutsch departed the Philippines for Washington, D.C. While en route (25-27 July 2012), Major Teutsch met with key members of the SOCPAC Staff at Camp Smith, Hawaii, to solidify the recently established relationships with JSOTF-P's higher headquarters. He returned to CAA on 31 July 2012.

Major Teutsch found his tour to be very rewarding and made the following observations at the conclusion of his deployment:

- ORSA analysts should time their deployments to the operational needs of the deployed unit – in this case, JSOTF-P's quarterly assessment and the SPPPS.
- ORSA analysts are responsible for making themselves useful to their deployed command: ORSA analysts must demonstrate their worth and search out ways to contribute to the mission. Most people do not fully understand what an ORSA analyst brings to the fight.



Conveying the ORSA skill set is the responsibility of the ORSA analyst.

- ORSA reachback support is one of the most valuable assets deploying ORSA analysts bring to the fight. In order to maximize its utility, reachback support must be responsive; deployed ORSA analysts avail themselves to reachback support when requested processes are deeper and more extensive than the deployed ORSA analyst has skills or time to provide. The Reachback team can be proactive as well; however, reachback usually works best when requested by the deployed ORSA analyst.
- An ORSA analyst's work should be process-focused and conducted with the intent to "work oneself out of a job." In other words, at some point, an ORSA analyst's products must continue on their own, independent of the ORSA analyst.
- Forward deployed ORSA analysts are "value added" to the command, they serve and advance the interests of the ORSA field. ORSA analysts must be located where they can provide the most good. There are a relatively few ORSA analysts Army-wide; they should be committed sparingly.



**Figure 6-13. Major Teutsch (right) handing over ORSA duties to his replacement, Major Estep, in front of the "Bullpen," the Special Staff office in Camp Navarro, Zamboanga City, Philippines**

### **6.3 CAA Deployed Analyst – Major Morris Estep**

Major Morris Estep of the Force Enablers (FE) Division of the Center for Army Analysis (CAA) deployed to the Republic of the Philippines in support of Joint Special Operations Task Force – Philippines (JSOTF-P) on 10 July 2012. This deployment supported the 1st Special Forces Group (Airborne) RFF made in early spring 2011, and was the third in-theater ORSA support extended to this Task Force (TF).



**Figure 6-14. Major Estep (left) with Major Nick Parker, JSOTF-P Information Operations Chief**

### **6.3.1 Pre-Deployment Preparation**

Major Estep made his final deployment preparations, to include obtaining his country clearances from PACOM, and preparing and validating deployment documents in lieu of processing through the CONUS Replacement Center (CRC) at Fort Benning, Georgia. This included medical records clearing and pre-deployment certification.

In July 2012, while en route to the Philippines, Major Estep stopped for 3 days at Camp Smith, Hawaii to meet with his SOCPAC staff officer counterparts. Additionally, Major Estep met with the Knowledge Management Team responsible for CIDNE, the primary database used to gather data for the Task Force's Assessments.

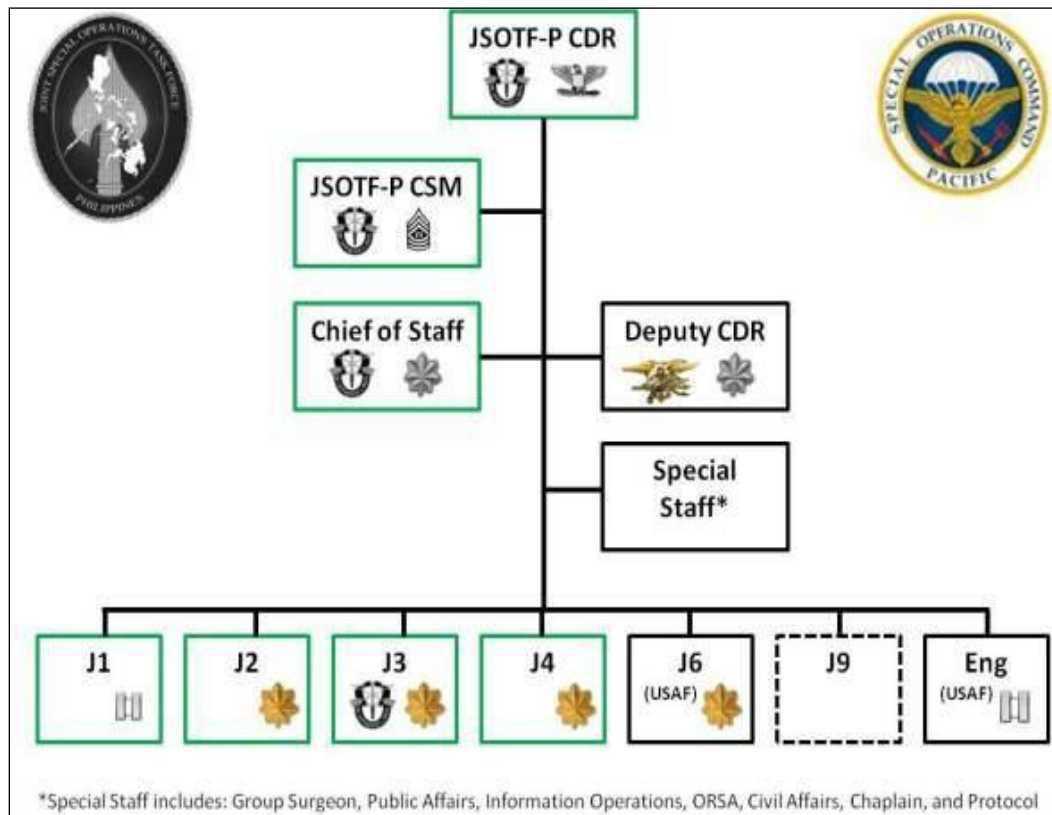
### **6.3.2 Deployment Activities**

Major Estep worked for the J35, Future Operations Chief. For performance and evaluation purposes, Major Estep was rated by the J35, Major DeVan Shannon and senior-rated by the JSOTF-P Commander, Colonel Mark A. Miller.

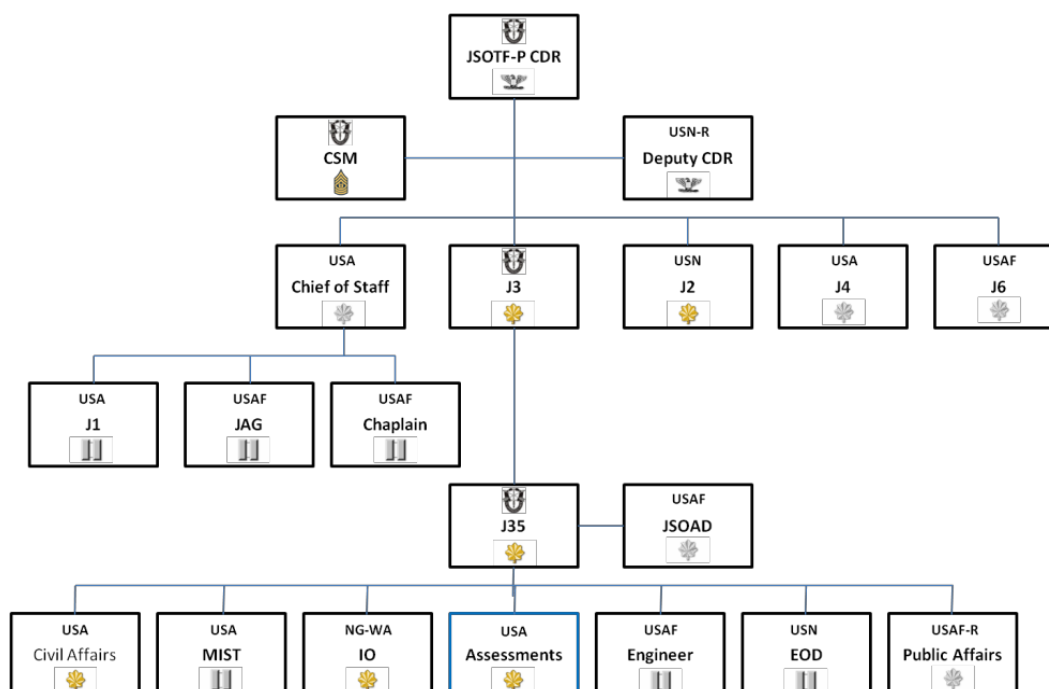
Figure 6-15 is a simplified organizational chart of the Task Force staff prior to the transition of personnel that occurred in the early part of August 2012. Those positions that were filled by 1st SFG(A) were designated with the Special Forces emblem. The majority of the incoming staff had not worked together prior to this deployment. During the previous rotation however, the majority of the staff had worked together in garrison prior to their deployment. Rather than arriving in theater as a homogenous staff transplanted from JBLM, the new staff unlike its

predecessor was assembled from various Active Duty and Reserve Army, Marine, Navy, and Air Force units.

Figure 6-16 displays the new organizational structure of the Task Force's Staff. The Special Staff elements were re-organized according to the rating scheme and not by element function or branch of service. The majority of the staff was thus directly responsible to the J3, Major Varman Chhoeung (a 1st SFG Officer). With the command group (consisting of the TF Commander, Command Sergeant Major (CSM), J3 and J2) splitting their time between Camp Navarro and Manila, the J35 assumed duties as the Current and Future Operations Officer to ensure continuity for daily operations in the absence of the Command Group.



**Figure 6-15. JSOTF-P Staff Structure before August 2012.**



**Figure 6-16. JSOTF-P Staff Structure after August 2012.**

Major Estep worked in two locations: (1) the interagency headquarters in Manila and (2) the Task Force headquarters in Zamboanga (i.e., the JOA). On a weekly basis, Major Estep met with members of USEMB and USAID to help them evaluate and assess their internal operations. He also assisted USEMB and USAID separately with their data exchanges to JSOTF-P.

Drafting the JSOTF-P Quarterly Assessment, and supervising and analyzing the SPPPS were Major Estep's two main efforts during his deployment. He also assisted primary staff sections with basic technical assistance. For example, Major Estep produced several quick-turn studies, to include the Provincial Violence Predictor Tool (estimated the number of violent acts within specific conflict affected areas during the election year); the PNP Force Computations (estimated the police forces required in specific areas as the AFP transitioned internal security to the PNP); the Philippine Assessment Tool (created as an internal assessment and evaluation of both AFP and PNP units to the battalion-level of detail as a capabilities-based approach to USG Phase IV to Phase V transition); and the Mix of Illumination Optimized (created a program for subordinate task forces and the AFP to use during engagements with violent extremist organizations during sustained tactical operations at night to optimize the use of illumination).

### 6.3.3 JSOTF-P Quarterly Assessment

Major Estep arrived in theater during the final preparation of JSOTF-P's 3rd quarter assessment (the establishment and conduct of which was the primary purpose for ORSA support to OEF-P). Major Estep had been assisting SOCPAC SOJ54 (Environmental Analysis and Assessments), specifically Ms. Michal Haskell (also a CAA member) with its efforts to devise the assessment framework for the Philippines.

The majority of the assessment framework revisions undertaken by SOCPAC relied upon the MOEs and their indicators as used in the SPPPS. Revisions to the assessment were ongoing at



the time of Major Estep's re-deployment, with Major Timothy Valadez (also of CAA) providing the continuity as Major Estep's replacement to the task force.

### **6.3.4 Southern Philippines Public Perception Survey**

Major Estep supervised the preparation of the fourth wave of the SPPPS—including revisions, scheduling, and data delivery. He also participated in the revisions of additional survey questions needed by the task force as well as its interagency partners relative to how the local populace in the JOA perceived Sharia'ah Law and how the Internal Peace and Security Plan of 2016, for transitioning internal security from the hands of the AFP back to the PNP, would be received during the historic peace accord signed by the Government of the Philippines and the MILF. These additional questions provided invaluable insight to the task force, interagency partners, and the Philippine Security Forces. In fact, the responses garnered from these questions were lauded by President Aquino as a significant contributing factor to incorporating previously disenchanted members of MILF into the PSF. This information subsequently led to the AFP Normalization Workshop, which established the guidelines for the Government of the Philippines to reintegrate MILF members for internal security as PSF.

The SPPPS had additional applications beyond addressing the command's queries and providing information for the quarterly assessment, the most prominent of which are detailed in the sections that follow.

### **6.3.5 Support to PSF**

Major Estep's support to the PSF consisted of three methods:

The first was to provide analysis of SPPPS data to the AFP and PNP leadership. Major Estep briefed these leaders at every level, from brigade to national. As each wave of the SPPPS data became available, Major Estep briefed his analysis to the subordinate task force commanders and their Philippine counterparts.

The second involved analytical support to the PSF. When Major Estep briefed the fourth wave's analysis to the AFP OJ3(Operations), he was asked to present his findings at the IPSP Working Group, the Philippine Assessment Tool Working Group (See Figure 6-17), and the AFP Normalization Workshop. The survey findings are one of many inputs into the timing decision for transitioning the various municipalities.



**Figure 6-17. Philippine Assessment Tool Working Group led by Major Estep.**

The third form of support Major Estep provided to the PSF was foreign internal defense: providing training for analysts of the AFP Research and Doctrine Division as well as the Office of the President of the Philippines' Analysis Division in Manila. The course of instruction included training on mathematical techniques, devising assessments, and analyzing data.

### **6.3.6 USAID**

Major Estep briefed at the USAID HQ in Manila approximately once per month, providing his findings and analysis of the SPPPS, to its leadership, to include its Director, Ms. Gloria Steele. The results of the fourth wave were used by USAID to establish one of their three Developmental Objectives for the JOA: Peace and Stability in the JOA through Rule of Law and Transparency in Governance. In fact, USAID used the SPPPS fourth wave results to increase their budget in the JOA by 7 percent compared to the prior year's budget. USAID relied upon the SPPPS data and graphical depictions of that data in all of its briefings and presentations, to include the Mindanao Working Group attended by JSOTF-P members, USAID and USEMB members.

### **6.3.7 Conclusion**

On 20 December 2012, Major Estep departed the Philippines for Fort Belvoir, after transitioning with Major Valadez (See Figure 6-18).

Major Estep found his tour to be very rewarding and made the following observations at the conclusion of his deployment:

- ORSA analysts should time their deployments to the operational needs of the deployed unit

- in this case, JSOTF-P’s quarterly assessment and the SPPPS.
- ORSA analysts are responsible for making themselves useful to their deployed command: ORSA analysts demonstrate their worth through practical contributions to the mission. The majority of the task force members did not fully appreciate the function of an ORSA analyst: conveying the ORSA skill set was easy to undertake once the Task Force Commander showed support for the products and the quick-turn tools produced to simplify daily functions.
- ORSA reachback support was a valuable asset that deployed ORSA analysts bring to the fight. In order to maximize its utility, reachback support must be responsive; deployed ORSA analysts avail themselves to reachback support when requested processes are deeper and more extensive than the deployed ORSA analyst has skills or time to provide. The reachback team can be proactive as well; however, reachback usually works best when requested by the deployed ORSA analyst.
- An ORSA analyst’s products must continue independent of the presence of an ORSA analyst. An ORSA analyst must avoid the tendency to do the work for others simply due to efficiency: practice and discipline win the day for other personnel in understanding the bigger picture of daily reporting and data gathering.
- As a low-density, high-value skill set, ORSA analysts must remain relevant to the deploying force. Experiences with tactical and operational units add to the Army-wide knowledge base and provide CAA with not only historical documentation on the fight during the Global War on Terror, but also provide our peers with our intellectual contributions in professional journals and memberships.



**Figure 6-18. Major Estep (right) handing over ORSA duties to his replacement, Major Valadez, in front of the “Bullpen,” the Special Staff office in Camp Navarro, Zamboanga City, Philippines.**

## **6.4 CAA Deployed Analyst – Major Tim Valadez**

Major (later Lieutenant Colonel) Timothy Valadez, of the Force Strategy (FS) division of the Center for Army Analysis (CAA), deployed to the Republic of the Philippines on 10 December 2012 in support of JSOTF-P. This deployment supported the First Special Forces Group (Airborne)’s RFF made in early spring 2011 and was the fourth in-theater ORSA support extended to this task force (TF). Major Valadez was promoted to Lieutenant Colonel near the end of his deployment and was reassigned to the Operations Analysis (OA) division upon his return.

### **6.4.1 Pre-Deployment Preparation**

CAA notified Major Valadez of his upcoming deployment on 05 June 2012. In preparation for deployment, Major Valadez attended the Deploying Analyst Course at Fort Lee, Virginia in August 2012. Between August 2012 and October 2012, Major Valadez also attended the following pre-deployment training activities: a Social Network Analysis course taught by the

Naval Postgraduate School's Common Operational Research Environment (CORE) Lab in Monterey, California; a Visual Basic for Applications (VBA) Continuing Education Program (CEP) course at Fort Belvoir; the ArcGIS 101 and 102 courses at National Geospatial-Intelligence Agency at Springfield, Virginia; and the Individual Terrorism Awareness Course at Winchester, Virginia.

Major Valadez also completed all PACOM required online training and theater-specific medical requirements and completed the Contract Officer's Representative (COR) course online. In December 2012, while en route to the Philippines, Major Valadez stopped for 3 days at Camp Smith, Hawaii, to meet with his SOCPAC staff officer counterparts (SOCPAC is JSOTF-P's higher headquarters) and the contractor responsible for CIDNE support. The relationships Major Valadez established during this brief visit proved invaluable during his deployment.

### 6.4.2 Deployment Activities

Major Valadez fully integrated into the JSOTF-P staff, serving in the J35 Current and Future Operations section. Figure 6-19 is a simplified organizational chart of the JSOTF-P staff. The Special Staff elements were organized according to the rating scheme and not by element function or branch of service. The majority of the staff was thus directly responsible to the J3. With the command group (consisting of the TF Commander, CSM, J3 and J2) splitting their time between Camp Navarro and Manila, the J35 assumed duties as the Current and Future Operations Officer to ensure continuity for daily operations in the absence of the Command Group. After consultation with the JSOTF-P Commander, the Center for Army Analysis agreed to maintain responsibilities for Major Valadez's Officer Evaluation Report.

Colonel E. Thomas Powers, the Operations Analysis division chief, was the rater and Dr. Steven Stoddard, the CAA Technical Director was the senior rater.

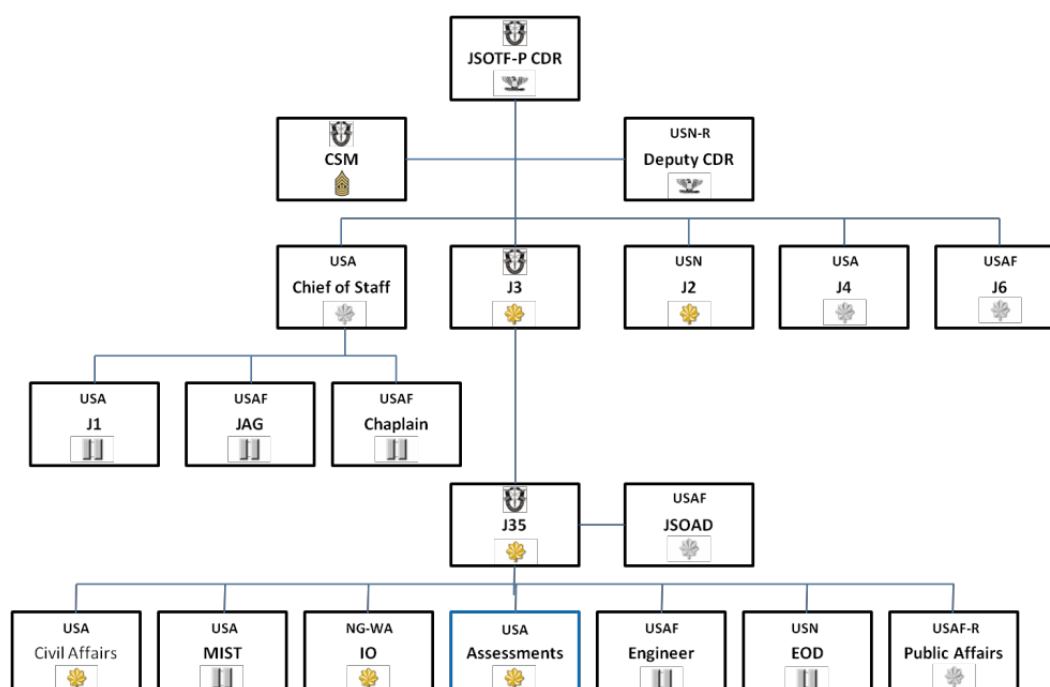


Figure 6-19. JSOTF-P Staff Organization Chart.

Major Valadez worked mainly in three locations: Camp Aguinaldo in Manila; the JSOTF-P HQ in Zamboanga City; and Fort Magsaysay, a Philippine Army post in northern Luzon. Major Valadez met weekly at the U.S. Embassy with the Mindanao Working Group to help evaluate and assess Joint, Interagency, Intergovernmental, and Multinational (JIIM) efforts in Mindanao. He assisted the U.S. Embassy Manila and USAID separately with their data exchanges to JSOTF-P and briefed perception survey results to both. Major Valadez spent several days at Fort Magsaysay assisting the Philippine Army Special Operations Command (PA SOCOM)'s staff to improve their Training and Education System for officers and non-commissioned officers alike. Major Valadez spent the majority of his time, however, at the JSOTF-P HQ within the JOA, which consisted of Mindanao, the Sulu Archipelago, and the surrounding waters, where he routinely interacted with subordinate TF commanders in Sulu, Basilan, and Cotabato. Additionally, he occasionally interacted with the staff of the AFP and the PNP at Camp Navarro in Zamboanga City and at Camp Aguinaldo in Manila. Major Valadez's multi-coordination efforts required extensive travel coordinated by the JSOAD throughout the theater. Major Valadez's three main efforts during his deployment were drafting the JSOTF-P Quarterly Assessment, supervising and analyzing the SPPPS, and assisting the PA SOCOM with improving their training and education system. Major Valadez also assisted staff sections with minor projects and performed regular staff duties as required.

### **6.4.3 JSOTF-P Quarterly Assessment**

The quarterly assessment in JSOTF-P derived from three main inputs: SPPPS, CIDNE data, and qualitative inputs from the TF commanders and JSOTF-P staff. This assessment measured progress along the three main lines of effort (LOEs) of the JSOTF-P campaign plan: (1) Enhance the Friendly Network, (2) Building Partner Counterterrorism (CT) Capacity and Capability, and (3) PSF maintained pressure on key terror groups. Several staff sections provided input critical to the second LOE, such as the Explosive Ordnance Disposal (EOD), Engineer, and Civil Affairs. CIDNE data coupled with key input from the J2 provided data to support the third LOE. CAA reachback analysis provided detailed CIDNE data parsing with supporting geospatial products. The most valuable input, however, for all three LOEs came from the TF commanders.

Previously, the assessments process gathered TF commander input by emailing the commanders a series of informing questions and tasking them to reply with the answers. For this iteration, Major Valadez tried a new approach, which proved to be successful. Major Valadez emailed the questions ahead of time as before, but then interviewed the TF commanders in person and took notes on the conversation. This yielded detailed answers, and the TF commanders preferred this method as it was more convenient to them. One TF included the Operations and Intelligence officers in the interview, which provided even better results. A former JSOTF-P analyst remarked that this innovation had moved the product away from being an ORSA product with JSOTF-P input to being a JSOTF-P product with ORSA input.

Major Valadez drafted, staffed, and delivered the 1st Quarter, Fiscal Year 2013 (FY13) JSOTF-P Assessment to the Commander, JSOTF-P for his signature in April 2013. Major Valadez also initiated the 2nd Quarter, FY13 JSOTF-P Assessment, which was to form the basis of the Final Commander's Assessment upon the JSOTF-P Change of Command originally scheduled for late June 2013. Major Valadez transitioned this assessment to Major Behnke, who finished the Final Assessment for the eventual change of command in August 2013.

#### **6.4.4 Southern Philippines Public Perception Survey**

The SPPPS was an established survey process initiated by CAA and JSOTF-P in 2011 to gauge public attitudes, specifically in the six conflict-afflicted areas of Zamboanga City, Cotabato City, Marawi City, Isabela City, and the islands of Basilan (excluding Isabela City) and Sulu. The survey had multiple stakeholders, including the U.S. Department of State, the U.S. Department of Justice, USAID, PNP, AFP, and, of course, JSOTF-P and SOCPAC. A professional polling company (TNS – Philippines) executed the surveys and delivered the raw data. The survey results informed strategic leadership at the U.S. Embassy, JSOTF-P, the AFP, and the PNP.

Major Valadez supervised the preparation of the fifth wave of the SPPPS—including revisions, scheduling, and data delivery. Major Valadez also supervised the Focus Group Discussions held in Zamboanga City that TNS used to validate their quantitative survey instrument. Major Valadez expanded stakeholder participation by soliciting their input for specific questions to be included in the survey. Each of the subordinate task forces, USAID, and the U.S. Embassy submitted questions that were of interest to them. Examples of survey topics included at stakeholder request were the upcoming general elections, the Basilan Circumferential Road project, and TV and media consumption habits. These questions were included in the fifth wave survey.

The survey directly influenced communications strategy at the U.S. Embassy. The Public Affairs section had emphasized a social media platform for disseminating messages throughout the JOA. After the survey indicated fewer people had Internet access than previously thought, the messaging strategy shifted to including traditional media and Short Message Service (SMS)-push messages as well as maintaining a social media presence.

#### **6.4.5 Support to Philippine Army Special Operations Command**

JSOTF-P and PA SOCOM initiated an effort to improve the PA SOCOM's Training and Education System in order to increase proficiency and interoperability with other Philippine and U.S. forces. The mandate was to “standardize, institutionalize, and professionalize” the PA SOCOM schoolhouse. The impetus behind this effort was to move the “Train, Advise, and Assist” portion of the mission from the JOA to their schoolhouse. This way, units conducting CT missions were already interoperable with U.S. forces by the time they reached the JOA, as opposed to U.S. forces training CT units already deployed to the JOA. This was a complex problem involving force design, allocation of resources, and conducting assessments. All three components of the PA SOCOM were involved: the First Scout Ranger Regiment (elite infantry), the Special Forces Regiment (irregular warfare units), and the Light Reaction Battalion (counterterrorism force).

JSOTF-P and PA SOCOM held a series of working group meetings at Fort Magsaysay to assist this effort. The working group consisted of the JSOTF-P J3, J35, ORSA analyst, Operations Sergeant, other Special Forces team members assigned to work with PA SOCOM, and Philippine SOCOM components' operations and training officers. Major Valadez was the sole non-Special Operations officer in the working group from either country. Major Valadez assumed lead of the project after the incumbent J3 redeployed and the incoming J3 had not yet arrived. Major Valadez coached the PA SOCOM staff members on the DOTMLPF-I (Doctrine, Organization, Training, Materiel, Leadership and Education, Personnel, Facilities, and Interoperability) method of capability gap analysis. Once the working group identified commonalities in components'

capability gaps, the working group referred materiel and facilities shortcomings to the AFP, and the Joint U.S. Military Assistance Group (JUSMAG) for action. Special Forces soldiers identified other solutions for shortcomings in the other domains of DOTMLPF-I. At the end of his rotation, Major Valadez transitioned leadership of the project to the incoming J3, Major Thiel, and the local Special Forces Operational Detachment-Alpha (ODA) team leader, Captain Min.

#### **6.4.6 Mindanao Working Group**

The MWG was a joint, interagency working group that met bi-weekly at the U.S. Embassy in Manila. During Major Valadez's tour, the U.S. Embassy Deputy Chief of Mission (DCM) chaired the MWG with the principal organizer being a Political Officer from the Political Section within the U.S. Embassy. The regular attendees were representatives from the following U.S. Embassy sections or agencies: Political Section, Economic Section, Regional Security Office, Public Affairs Section, USAID, ICITAP, and JUSMAG. The following JSOTF-P members also attended: Commander, Deputy Commander, J3 (occasionally), J2 (occasionally), Information Operations Officer, Public Affairs Officer, and Assessments Officer. Several Local National Employees that originally hailed from Mindanao also attended to lend insight to the discussion.

The agenda typically followed this sequence of events: Opening remarks by the DCM (or Chief, Political Section in his absence); an introduction of personnel new to the group; and a briefing by the JSOTF-P Commander/Deputy Commander on pertinent events (at the unclassified level) in the JOA. An overview of security concerns by the Regional Security Officer would follow. Next, each section or agency would provide details of their travel into and out of the JOA to conduct special programs or initiatives in Mindanao. Finally, the meeting would end with a "special topic" in which one of the sections or agencies, such as USAID, presented in detail one of their initiatives in Mindanao. During one such meeting, Major Valadez presented the results of the SPPPS to the MWG.

#### **6.4.7 Other Analytic Efforts and Staff Functions**

Major Valadez also performed minor analytic projects in support of other JSOTF-P staff sections, particularly within the J35, and participated in regular staff functions. Major Valadez participated in the Targeting Working Group, Command and Staff updates, and attended routine meetings such as the Operations and Intelligence (O&I) update. Attending these meetings was extremely helpful as the Commander routinely gave insight and guidance to his staff through these forums. Major Valadez assisted other staff sections (Military Information Support Team, Information Operations, and Civil Affairs) with MOEs development for their own internal assessments. Major Valadez performed a quick analysis of costs of inter-theater air movement and developed an Excel tool that the Public Affairs officer used to gauge positive or negative tone of local articles concerning the PSF. Major Valadez conducted a 15-6 investigation on behalf of the Commander. He also taught a short class covering intermediate Excel functions, with emphases on how staff sections can use the program more effectively in their routine staff functions.



### 6.4.8 Conclusion

On 14 June 2013, Lieutenant Colonel Valadez departed the Philippines for Fort Belvoir, Virginia, after transitioning with Major Al Behnke of the TRADOC Analysis Center.

Lieutenant Colonel Valadez (see Figure 6-20) benefited from the professional development and broadening experiences that the deployment afforded him. Lieutenant Colonel Valadez made the following observations at the conclusion of his deployment:



**Figure 6-20: Lieutenant Colonel Valadez at Camp Navarro, Zamboanga City, Republic of the Philippines.**

- The ORSA analyst must be a fully integrated member of the staff on which he or she serves. This can be a challenge when there is only one ORSA analyst on the staff, and/or when the ORSA analyst joins an existing staff as an individual augmentee. ORSA analysts can integrate quickly by attending all meetings and by bringing their critical thinking and problem solving abilities to routine staff processes; they should assist other staff sections whenever possible. Frequently, ideas for quick-turn projects arise during staff meetings, which represent “low-hanging fruit” and help to establish the credibility of the ORSA analyst and his or her skill set.
- All assessments are only as reliable as the quantitative and qualitative data gathered. It is important that the ORSA analyst go wherever the data are. ORSA analysts should proactively perform quality assurance/quality control (QA/QC) on all entries into CIDNE or other similar databases. ORSA analysts must work with the Operations Officer and Chief of Staff to ensure taskforces are completing their entries to standard to allow for future data analysis. ORSA analysts must also recognize that commanders and senior staff are extremely busy and often lack time to provide qualitative input. ORSA analysts must schedule office calls with commanders and senior staff and elicit qualitative input for the Assessment product.
- ORSA reachback support is an invaluable asset to a deployed ORSA analyst and his or her organization. Deployed ORSA analysts request reachback support when requested processes exceed the capacity or capabilities of the deployed ORSA officer or section. The reachback support CAA provided to Lieutenant Colonel Valadez was highly effective because it was responsive and timely. Maintaining this level of support for future deployed analysts is critical. While the reachback team can proactively provide assistance, reachback works best when requested by the deployed ORSA analyst.
- Deployed ORSA analysts will experience physical stress from the long working hours and austere living and working conditions. Deployed ORSA analysts must take time to keep physically fit and mentally sharp by taking time to conduct physical training on a daily basis and by taking time to eat proper, nutritious meals in the dining facility. Deployed ORSA analysts must also take time to keep in touch with their home front, both with their parent unit through regular secure video teleconference and email contact, and more importantly with their family and friends through phone and Internet.

## **6.5 TRAC-WSMR Deployed Analyst – Major Al Behnke**

Major Al Behnke of TRADOC Analysis Center White Sands Missile Range (TRAC-WSMR) deployed to the Republic of the Philippines on 28 May 2012 in support of JSOTF-P. TRAC assumed support for JSOTF-P from the Center for Army Analysis (CAA) after four rotations.

### **6.5.1 Pre-Deployment Activities**

Major Behnke began his pre-deployment preparation with a visit to CAA in January 2013 during an unrelated temporary duty trip to the area. Major Behnke spent a day with Lieutenant Colonel Lindquist and other CAA analysts and discussed the background of the mission, what analysis was done, and reachback support available.

Major Behnke accompanied members of CAA (Colonel Sperling and Dr. Jim Treharne) and TRAC (Colonel Gesling) leadership on their site visit in February 2013. During this pre-deployment site survey, the group met with U.S. Embassy staff, the SPPPS contractor (TNS), and key members of JSOTF-P staff and subordinate task forces. On the return trip, the group visited SOCPAC for a short orientation and discussion of analytical activities in the Philippines.

Major Behnke also attended the Deploying Analyst Course at Fort Lee, Virginia, run by CAA in March 2013. This course helped familiarize analysts with tools that may be useful in a deployed environment. The course was also very good for networking with other deploying analysts.

Major Behnke completed his pre-deployment preparations from White Sands including country/theater clearances, medical, and the COR course.

En route to the Philippines, Major Behnke spent 2 days at SOCPAC to get an update on analysis activities in the Philippines, including the Philippines country assessment that was conducted in February 2013. Major Behnke also met with the CIDNE contractors in order to become more familiar with CIDNE and identify issues and unique circumstances with CIDNE in support of JSOTF-P.

### **6.5.2 Deployment Activities**

Major Behnke worked for the Chief of Staff and worked with all the staff sections and subordinate task forces to provide analytical support. For performance purposes, Major Behnke received a letter of input from JSOTF-P and rated by his home station rating chain.

Colonel Mark Miller relinquished command of JSOTF-P to Colonel Robert McDowell during Major Behnke's tour. The change of command was delayed until August due to Colonel McDowell's previous commitments. His arrival as 1st SFG(A) Commander signaled the shift from an ad hoc staff organization to a SFG(A)-dominated staff. Colonel McDowell brought most of his key staff forward to support JSOTF-P operations as well as 1st SFG(A) operations. This led to a perceptible shift in how the staff functioned. In addition, the arrival of the new commander ushered in a period of "right-sizing" of JSOTF-P. One of the immediate impacts of this "right-sizing" was a grade reduction as individuals rotated in. This was not necessarily a loss of capability, but more a loss of experience.

### **6.5.3 Southern Philippines Public Perception Survey**

Major Behnke presented the results of the fifth wave of the SPPPS which was delayed by the Sabah Crisis. Due to the crisis, the results arrived just before Major Behnke arrived in the

Philippines. Major Behnke worked with Lieutenant Colonel Valadez to analyze and prepare the results for presentation. Lieutenant Colonel Valadez presented the results to the Mindanao Working Group and the Task Force commanders within JSOTF-P. Major Behnke presented the results to many groups and organizations including the Philippine National Police Joint Intelligence Working Group, the Law Enforcement Synchronization Intelligence Office, 6th Infantry Division staff, the Civil Military Operations School among others.

Major Behnke planned and prepared for the sixth wave of the SPPPS. This wave, as with the previous wave, was delayed due to a major crisis within the Southern Philippines, an attack on Zamboanga by rogue elements of the MNLF. This crisis lasted about 3 weeks. As a result, the focus groups were delayed 1 month and moved to Marawi and Lanao Del Sur due to the situation in Zamboanga. Emotions ran high (due to the physical damage sustained in Zamboanga and islands nearby).

For the quantitative portion of the survey, the emotions in Zamboanga and nearby islands were calm enough to survey the six areas affected by the conflicts allowing for consistency and trend analysis. In Zamboanga City, the barangays were designated as a “must survey” area to ensure the impact of the crisis was properly measured. The sixth wave results were delivered in early January 2014 to Major Chris Marks.

#### **6.5.4 Support to U.S. Embassy**

Major Behnke supported several parts of the U.S. Embassy staff, including the Mindanao Working Group, ICITAP, USAID, the Regional Security Officer, and the Public Affairs Section, among others. The staff sections were very interested in both the results of the SPPPS as well as the overall current state of affairs in the southern Philippines. Several of the staff sections were more active than previous waves of the SPPPS and submitted several topics to consider.

#### **6.5.5 Information Operations Working Group**

Major Behnke worked extensively with the Information Operations (IO) Working Group to help craft IO themes in coordination with the Civil Affairs company and Military Information Support Operations detachment. Utilizing his analysis of the SPPPS and other sources, Major Behnke supported civil affairs projects, counter radicalization efforts, and counterterrorism efforts.

#### **6.5.6 Support to Philippine Security Forces**

In addition to briefing the results of the SPPPS, Major Behnke answered requests for information and more in depth analysis of the results. MAJ Behnke participated in a joint planning subject matter expert exchange and presented a class on how to write MOE/MOPs and how they are related. The Civil Military Operations school was very interested in the ORSA field and possibly sending one of their officers to ORSA Military Applications Course (ORSA-MAC).

#### **6.5.7 Zamboanga Crisis**

MAJ Behnke put together an assessment of the Philippine Security Forces response for the SOCPAC commander, and assisted other staff sections in their efforts, especially in information operations.

### 6.5.8 Typhoon Haiyan (Yolanda) Response

Typhoon Haiyan (better known as Yolanda) was one of the most devastating typhoons to make landfall. JSOTF-P quickly deployed forces into the hardest hit areas in order to develop a better picture of the conditions on the ground and help coordinate follow-on forces from III Marine Expeditionary Force (MEF). Until III MEF arrived, JSOTF-P was responsible for the logistical support of their forward elements. Major Behnke quickly developed a tracking system in conjunction with the J35 plans officer to identify who was at each location, what they needed, when additional equipment and supplies were to be delivered, and the rotation of the teams on the ground. This tracking system became the go-to system for the entire task force headquarters in Zamboanga. Major Behnke also was responsible for the after action / lessons learned report for JSOTF-P.



**Figure 6-21. Major Behnke preparing to board a rigid hull inflatable boat (RHIB) in Zamboanga en route to Basilan.**

### 6.5.9 Conclusion

As an ORSA cell of one, it is incumbent upon the ORSA analyst to show the value-added and apply his skills wherever he can. The previous ORSA analysts did an excellent job of showing their value added, which opened doors and made Major Behnke's job easier, but as key personnel rotated, the reselling of the ORSA analyst's value was needed.

### 6.6 TRAC-Monterey Deployed Analyst – Major Chris Marks

Major Christopher (Chris) Marks, of TRAC – Monterey, was the sixth and final ORSA analyst embedded in JSOTF-P. During his tenure, the task force reduced in size and in scope of mission to the point, that many functions, including that of the Assessments cell, were eliminated. With the loss of an embedded ORSA analyst, responsibilities for OR analysis, particularly of the SPPPS, shifted to the higher headquarters at Camp Smith, Hawaii, where CAA had an ORSA analyst embedded on rotation. Lieutenant Colonel Christian Teutsch, an analysts and a JSOTF-P alum, along with his successors, Ms. Sarah Thambidurai and Mr. Steve Heinlein, provided analytic support to JSOTF-P until the task force dissolved in March 2015. Major Marks played a pivotal role in easing the transition for JSOTF-P and served with distinction as the final JSOTF-P embedded ORSA analyst.

#### 6.6.1 Pre-Deployment Activities

Major Marks accompanied Colonel Todd Gesling on a pre-deployment site survey in November 2013. Joining Major Al Behnke in the Philippines, they met with U.S. Embassy staff, the SPPPS contractor (TNS), and key members of JSOTF-P staff and subordinate task forces. They also visited SOCPAC for a short orientation and discussion of analytical activities in the Philippines.

### **6.6.2 Southern Philippines Public Perception Survey (SPPPS) Wave 6**

Major Marks arrived at JSOTF-P just before Wave 6 of the data was delivered, enabling Major Behnke to redeploy on 15 December 2013. Major Marks immediately began analysis of Wave 6 and coordination for Waves 7 and 8, the final two waves that CAA would fund. Wave 6 had been delayed by the Zamboanga Crisis, an event in mid-September 2013 in which elements of the MNLF had seized or destroyed numerous buildings in Zamboanga, injuring, killing, and/or displacing tens of thousands of residents. This event would largely dominate Major Marks' analytic efforts throughout his tour.

In January 2014, Major Marks began presenting the results of Wave 6 of the SPPPS to survey stakeholders, including the JSOTF-P command and staff, members of the U.S. Embassy, USAID and the Mindanao Working Group, senior members of the Philippine Armed Forces and the Philippine National Police, and local government officials.

At a discussion with Ms. Gloria Steele, USAID-Philippines Mission Director, Ms. Steele expressed interest in seeing the SPPPS continue beyond Wave 8 and termination of JSOTF-P operations. Ms. Steele, Major Marks, and Major Chris Casper, JSOTF-P MISO officer, arranged for future meetings that would coordinate the hand-off of SPPPS activities from JSOTF-P to a joint effort between USAID and PACOM.

The U.S. Embassy Political office also responded positively to the SPPPS briefing and arranged for Major Marks to present the results to Prof. Miriam Coronel-Ferrer, the lead government negotiator and chairperson of the Bangsamoro Peace Process. Prof. Ferrer and her staff appreciated obtaining the results and asked to continue to receive the survey results in the future.

Most of the analyses and presentation for Wave 6 was comprised of descriptive statistics on the data. However, some of the analyses included inference on population averages using traditional statistical inference methods and even some Bayesian methods were employed to provide answers to very specific questions about support for the Framework Agreement on the Bangsamoro.

### **6.6.3 Southern Philippines Public Perception Survey (SPPPS) Future**

In addition to presenting results, Major Marks elicited input from the stakeholders concerning the next survey wave in January and February 2014. He also oversaw the contracting process for Waves 7 and 8, and completed the planning for Wave 7 including attendance and analysis of the qualitative data collection phase. The quantitative data collection and aggregation phase was in progress when Major Marks departed the Philippines in June 2014.

The SPPPS transition process involved multiple meetings with USAID, the PACOM Augmentation Team (PAT), and the JSOTF-P MISO. Most of the meetings focused on finding a way for USAID to fund the survey while the PAT provided contract oversight. Major Chris Casper was instrumental in organizing this relationship and facilitating the transition of administrative control of the SPPPS in the Philippines to the PAT MISO. CAA would continue to provide analytical support through its analyst on rotation at SOCPAC.

This arrangement met the intent of the JSOTF-P command by transitioning functions that were obsolete from the perspective of JSOTF-P to entities with a more enduring presence in the Southern Philippines.

### 6.6.4 Cooperation with Philippine Security Forces

Major Marks supported JSOTF-P's efforts to partner with the Philippine Armed Forces at all levels. He met several times with the Western Mindanao Command (WESMINCOM) assessments officer to discuss assessments doctrine and practice. He also gave several presentations to the WESMINCOM staff on U.S. Army Assessments doctrine.

### 6.6.5 Zamboanga Internally Displaced Persons

Colonel McDowell, the JSOTF-P commander, directed Major Marks to assist USAID and the Zamboanga City Government in determining sources of livelihood for displaced civilians that had lost their homes in the Zamboanga City Crisis in October 2013. In addition to assisting USAID, the commander included this task as part of an effort to sustain the positive relationship between JSOTF-P and Zamboanga City.

Working with USAID and city officials, Major Marks collected data sets from multiple sources including national government census data, city government social aid data, and data collected by nongovernmental organizations related to the affected people and affected neighborhoods.

Major Marks merged the data sets and provided summaries and basic inference on the peoples located at the various internally displaced person evacuation centers around Zamboanga City. The results were presented to USAID and Zamboanga City Mayor Beng Climaco.

### 6.6.6 Assessment

Major Marks collected and analyzed data from the SPPPS, CIDNE, JSOTF-P reports, and subordinate task forces to provide an objective assessment of JSOTF-P's progress against its operational objectives. The assessment was provided to Colonel McDowell, who appreciated the report but refrained from disseminating it outside of JSOTF-P.

### 6.6.7 Conclusion

Colonel McDowell, the JSOTF-P commander, employed the task force ORSA analyst in an unconventional and unexpected way. While assessments did not receive the same emphasis as they had in years passed, Colonel McDowell supported multiple ORSA tasks. The tasks were meant to leverage an ORSA analyst's unique capability to solidify or improve relationships with partner forces, national and local government officials, media, and other entities within the U.S. Government, all the while supporting the mission with useful analytical products. His parting words to Major Marks were that we had "changed his mind" about ORSA analysts, which was clearly meant in a positive light.



**Figure 6-22. Major Marks working with Philippine partners.**



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## 7 STRATEGIC INSIGHTS ON DEPLOYED ANALYTICAL SUPPORT

The JSOTF-P model provides valuable insights for any deployed analyst program. CAA involvement with 1st SFG(A) sprang from a personal relationship between leaders of the two organizations at a time when “ORSA” was a generally unknown entity in the SOF community. Personality proved critical throughout the interaction. Both early leaders showed vision; Colonel Hill through his ability to express the utility of operations research and Colonel Beaudette through his openness to including ORSA analysts on his team. The individual analysts' personalities also contributed to their success while deployed.

ORSA analysts demonstrated their worth during the CPX at JBLM prior to the unit's deployment. This interaction was a critical teambuilding event, but it also permitted the CAA team and CAA leadership to scope future ORSA SOF involvement. That involvement is predicated upon the ORSA analysts building the appropriate skill sets *before* they deploy. **ORSA analysts need to be able to do things that the rest of the staff cannot, or they will not add value to the command.**

ORSA analysts also need to be familiar with the theater to which they are going; regional specialization is key, as is continuity. **For operational commanders, context is everything.** The Philippines is not Afghanistan. Analytic techniques may exist that work in both regions, but they will not be useful (or used) if the analysts cannot fit the analysis to the situation.

Interagency work is different from Army staff work, and it is going to be increasingly a part of deployments, as has already been seen in the Pacific, Afghanistan, and Africa. Analysts need to be adaptable to the mission and conditions of their deployed environments so that they can maximize their impact, even if it occasionally means serving in roles tangential to our core set of ORSA competencies.

Deployments offer ORSA analysts the opportunity to hone their craft and contribute to the fight in a very meaningful way. Deployed ORSA analysts are also ambassadors of their functional area. Their selection for deployment should be scrutinized closely to ensure they have the appropriate skill set and personality for the varying missions. Doing so benefits the individual analyst, the deployed command, and the OR community.



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## **APPENDIX A PROJECT CONTRIBUTORS**

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## APPENDIX B ACRONYMS

<b>Acronym</b>	<b>Definition</b>
AFP	Armed Forces of the Philippines
ANASOC SOAG	Afghan National Army Special Operations Command – Special Operations Advisory Group
AOR	area of responsibility
ARMM	Autonomous Region of Muslim Mindanao
ASG	Abu Sayyaf Group
ATA	Antiterrorism Assistance
CEP	Continuing Education Program
CIDNE	Combined Information Data Network Exchange
CIG	Commander’s Initiatives Group
CJCS	Chairman of the Joint Chiefs of Staff
CJTF-HOA	Combined Joint Task Force – Horn of Africa
CJTF-OIR	Combined Joint Task Force – Operation INHERENT RESOLVE
COA	course of action
CONUS	Continental United States
COR	Contract Officer’s Representative
CORE	Common Operational Research Environment
CPX	command post exercise
CRC	CONUS Replacement Center
CSM	Command Sergeant Major
CSTC-A	Combined Security Transition Command- Afghanistan
DCM	Deputy Chief of Mission
DCO	Deputy Commander
DCS	Deputy Chief of Staff
DEA	Drug Enforcement Administration
DHS	Department of Homeland Security
DOJ	Department of Justice
DOTMLPF-I	Doctrine, Organization, Training, Materiel, Leadership and Education, Personnel, Facilities, and Interoperability
ECON	Economic
EOD	Explosive Ordnance Disposal
EXORD	execute order
EXSUM	executive summary
FGD	focus group discussion
FID	foreign internal defense
FY13	Fiscal Year 2013
HVI	High Value Individual
ICITAP	International Criminal Investigations Training Assistance Program
IPSP	Internal Peace and Security Plan
JBLM	Joint Base Lewis-McChord
JCET	Joint Combined Exchange Training
JIATF-W	Joint Interagency Task Force – West
JIIM	Joint, Interagency, Intergovernmental, and Multinational

<b>Acronym</b>	<b>Definition</b>
JMD	Joint Manning Document
JOA	joint operations area
JSOAD	Joint Special Operations Air Detachment
JSOTF-P	Joint Special Operations Task Force – Philippines
JTF	Joint Task Force
JUSMAG	Joint U.S. Military Assistance Group
LCE	Liaison Coordination Elements
LOE	line of effort
LOO	line of operation
MEF	Marine Expeditionary Force
MILF	Moro Islamic Liberation Front
MISO	Military Information Support Operations
MNLF	Moro National Liberation Front
MOE	Measure of Effectiveness
MOEI	Measure of Effectiveness Indicator
MOP	Measure of Performance
MWG	Mindanao Working Group
NATO	North Atlantic Treaty Organization
NATO-RS	Resolute Support
NIPR	Nonsecure Internet Protocol Router Network
NSOCC-A	NATO Special Operations Component Command – Afghanistan
O&I	Operations and Intelligence
ODA	Operational Detachment-Alpha
OEF-P	Operation ENDURING FREEDOM – Philippines
OFS	Operation FREEDOM’S SENTINEL
OIR	Operation INHERENT RESOLVE
ORSA	Operations Research/Systems Analysis
ORSA-MAC	ORSA Military Applications Course
PA SOCOM	Philippine Army Special Operations Command
PACOM	United States Pacific Command
PAM	pamphlet
PAS	Public Affairs
PAT	PACOM Augmentation Team
PMT	pre-mission training
PNP	Philippine National Police
POI	program of instruction
POL	Political
PSF	Philippine Security Forces
RFF	request for forces
RSO	Regional Security Office
SFG	Special Forces Group
SFG(A)	Special Forces Group (Airborne)
SIPR	SECRET Internet Protocol Router Network
SITREP	situation report
SME	subject matter expert

<b>Acronym</b>	<b>Definition</b>
SMS	Short Message Service
SOCAPAC	Special Operations Command Pacific
SOF	special operations forces
SPPPS	Southern Philippines Public Perception Survey
TCAV	terrorist coordination and assistance visit
TNS	Taylor Nelson Sofres
TRAC	TRADOC Analysis Center
TRAC-WSMR	TRADOC Analysis Center White Sands Missile Range
TRADOC	United States Army Training and Doctrine Command
USAID	U.S. Agency for International Development
USCINCPAC	U.S. Commander in Chief for Pacific Forces
USDA	U.S. Department of Agriculture
USEMB	U.S. Embassy
USG	U.S. Government
VBA	Visual Basic for Applications
VEO	Violent Extremist Organizations
VFA	Visiting Forces Agreement
VTC	video- teleconference
WESMINCOM	Western Mindanao Command

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